# EXPERIENCED TEACHERS' PLANNING PRACTICES: ORIENTING, INVENTING, AND ENVISIONING

BY

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DISSERTATION

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# ABSTRACT

Although every teacher plans for instruction, little is known about how this complex practice is accomplished in everyday contexts. The bulk of research on teacher planning has construed this core practice as process of mental decision making about a narrow collection of instructional factors. This study broadens the research on teacher planning practices by moving beyond these limiting frames by investigating the planning practices of eight elementary, middle, and high school teachers.

To guide my study, I have assembled a three-part theoretical framework: literate activity (Prior, 1998), mediated agency (Wertsch, 1991), and distributed cognition (Hutchins, 1995). All three of these theories invite a more holistic framing of the work of teacher planning and situate it in everyday practice. I use qualitative methodology to better situate and understand teachers' choices in their contexts. The data collection for this study extended over the course of a K-12 academic year, during which time I conducted semi-structured interviews, conducted participant observations, wrote jottings and field notes, and collected artifacts of planning and instruction, including participant-created screencast think-alouds.

Findings indicated that planning is a social and distributed process that accrues over time and that it is responsive to its context. Across these findings, planning entailed teachers articulating their own activity and student activity in relation to each other through three core practices: orienting, inventing, and envisioning. In sum, I argue that theoretical attention to the development of teachers' practices can help researchers reconceptualize how we understand, study, and support planning for student learning and teacher development.

*for Bev, Maggie, and Frannie*

*&*

*for Derek*

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# CHAPTER 1

# INTRODUCTION

## Vignette

*Jessica, Kaylah, and Tammy sat at a conference table in the wide hallway outside of the guidance counselor offices. This was an In-Service Day for the two sixth grade teachers, Jessica and Kaylah, guided by their instructional coach and English department head, Tammy. Everyone, including myself, had their laptops open and we were each signed into a Google Doc of the Short Story unit.*

*As the first unit of the year, it had previously served as a wide-ranging genre study. In the course of this conversation, the group had revised the formerly seven objectives to one all-encompassing objective. Typed out in its own box in the Understanding by Design template, the objective on the screen now read:* 'Recognize and discuss the story structure, literary elements, and characteristics of the genres of.*' Working towards finishing the sentence, the current deliberation concerned which short story genres to choose.*

*Tammy asked Jessica and Kaylah, "So, if you were going to do two, which were you leaning towards really wanting to focus this unit on?" Jessica, having earlier mentioned that science fiction would help her not rely on the class anthology as much, suggested it again. She added now that "science fiction or fantasy could easily be incorporated, especially if we got back our second lit circles." Tammy replied, "Which I'm thinking we might be able to," continuing, "this would be really fun with science fiction and or fantasy and the for one of the lit circles. And the other one is realistic fiction because kids love that shit… it's why* Hunger Games *won book of the year."*

*When Tammy asked Jessica how many weeks she thought the unit would take, she replied "I want to say six, but actually think it's going to probably be seven" to which Tammy noted that they had "a* really *weird schedule at the beginning of the year" and began flipping through her planbook calendar, reciting "15th we're off, 16th and 17th is Institute, [21st is]… 6th grade only, which should be making your lives a lot easier because it's a whole day of lockers, transition, and - [pointing to a spot on the page] - this is 'get your shit together, we start learning on the 22nd."*

*After some more deliberation on how many weeks the unit might take, Tammy picked up a paper copy of the 6th grade Scope and Sequence and said, "See and here's how we had the description in the Scope and Sequence:* This first novel study focuses on the genre of adventure survival told through a historical fiction perspective.*" Jessica pointed out that their working plan for the short story unit didn't cover that description, but Tammy said that they fulfill the objective later in the semester.*

*Jessica asked Kaylah what she thought, adding that "I guess having two genres would also be nice because if they really didn't like one…" Tammy chimed in, mentioning the possibility that the librarian could help select the book: "I mean Katia can pull enough, right? I mean, I am* personally *someone who hates those two types but if you made me, I would really learn something about it…" Jessica chimed in, "I didn't like it when I was growing up until I was reading it for pleasure," added Jessica. "Like you said, nobody ever - that's never a book I read, I read all historical and realistic fiction."*

*Without missing a beat, Jessica shifted to reading from the collaborative Google Doc:* "'Recognize and discuss the story structure of literary elements of a genre' *I'm changing the top*

*part- so* ‘why are there different kinds of texts*′ doesn’t need to go there" and she deleted the phrase from the shared Google Doc.*

*As the conversation moved on, Jessica noted that she felt like "it would be easier to do something like an anchor chart in this kind of unit than it is currently, or really use your word wall, something like that." Turning to Kaylah, Jessica continued, "But we just need to decide. I feel like you seem very passionate about science fiction, I love science fiction." Tammy, as an aside, chimed in, "Because theme is easy to do with realistic fiction. If you did those two - if you’ve got seven weeks…" Jessica shrugged, and said, "that works for me." Kaylah shrugged and agreed.*

*Enthusiastically, Tammy said, "Go ahead! This is the part, as long as you hit the standards!" Jessica turned again to Kayla and asked, "Do you want to do those two? I guess that would work nicely, because we could do one lit circle of each."*

*As this part of the conversation finished, Jessica typed the end of the partially-written objective, completing it with* 'science fiction and realistic fiction.'

**Vignette Analysis**

At first pass, this interaction appears to be a straightforward example of grade-level teachers planning an upcoming instructional unit. They articulated objectives and made decisions about instructional activities, possible sequence, and potential assessments (Tyler, 1949). The group discussed content, considered learners' preferences, and anticipated students' behavior (Hunter, 1979). They considered the yearly scale in relation to the unit, and decisions from this meeting would lead to weekly and daily planning (Sardo Brown, 1993; 1996). Working within the discipline of English Language Arts, the planned curriculum was oriented to disciplinary

knowledge and domain-specific ways of knowing, thinking, and doing (Burroughs & Smagorinsky, 2009).

With a few more passes, other features of this situation reveal a more nuanced, social, and distributed version of teacher planning. The decision making was often framed as collaborative, for example, Jessica repeatedly asked what "we" think. While the teachers did select two short story genres, no specific content was chosen and there was still an open question about whether or not they would have time for one or two literature circles. Other people were brought up in the conversation, such as the librarian Katia, who was an anticipated resource for yet-to-be determined content. Online and offline texts informed each other: The teachers and instructional coach were collaboratively writing a shared Google Doc (that has its own history with multiple audiences) and they read aloud from the paper version of the grade-level Scope and Sequence. This traditional, formal document was treated as a flexible guide, open to revision and interpretation. Time was used as an evaluation tool for working ideas - in looking at the calendar, Tammy pointed out non-instructional events that would shape instructional planning, and Jessica wanted to give herself a little leeway with the weeks allotted to the unit. Both teacher and student preferences guided decision making - all three participants drew upon their personal preferences and longstanding literate histories. Potential classroom artifacts played a role - in this case Jessica mentioned how she might anticipate using a Word Wall and Anchor Chart.

There is much more going on here than a series of decisions regarding a narrow collection of instructional factors. A broader perspective on planning allows us to see the intellectual and creative work of teacher planning, the places and people that inform that work, the multi-faceted, multi-purposed texts teachers draw upon and create, the texts that teachers

compose, the rehearsals as teachers consider variables and possibilities, as well as the environments and opportunities teachers construct for students.

**Statement of the Problems**

I argue that the current literature on planning is too limited in its attention to the evidence, influences, and means of teacher planning. This study addresses the problems in the current literature, including: its reliance on planning as decision making about restricted instructional factors in specific representational forms (i.e. lesson plans and unit plans), the limited understanding we have of teachers' composing processes, and the dearth of research on teachers' use of digital technology in their planning practices.

This study draws together seemingly disparate work on decision making, teacher knowledge, pedagogy, composing practices, multimodality, technology, and conceptualizing time within - and beyond - traditional school boundaries. These fields, disconnected in the literature, are assembled by teachers in their practice. We are in need of a theory of teacher planning that expands conceptual and analytical boundaries to characterize the complex, multi-faceted activity of what teachers do as they anticipate and invent for classroom instruction.

**Purposes and Contributions of the Study**

For this study, I investigate situations and trajectories of teacher planning. To do so, I argue for a broader conceptualization of planning than has generally informed planning research to date. My primary purpose is to understand the nature of teachers' planning practices in current settings. The contributions of this study are multi-fold because I expand on a dormant field of research, think more broadly than current conceptualizations of teacher practice, and lay the groundwork for a theory of teacher planning that illuminates the complexity of its forms and processes. My work has implications for drawing into relation many voices - researchers,

educators, teachers, theorists - that currently frame and support in-service and pre-service teachers.

This work is critical, in the sense that I push against contemporary dynamics of teacher proofing curricula that co-opts the inception and delivery of instruction (Scherer, 2012). My work is also clearly pragmatic because its goal is to inform and support better practice.

**Research Questions**

This research is guided by three questions, which carry through the study.

(1) How do teachers plan for classroom instruction?

(2) How do teachers describe their planning practices?

(3) What practices, texts, relationships, and spaces do teachers leverage as they plan for instruction?

# CHAPTER 2

# A REVIEW OF THE LITERATURE

In this chapter, I review the literature on planning by taking three passes at the research on teacher planning. First, I trace the traditional research on planning, based on lesson plans and school-bound factors. Second, I broaden my consideration to include planning literature that attends to various features and goals of teachers as they plan. Third, I draw in contemporary fields of research that do not overlap with the planning research, but that I argue need to. Looking at all three sections, I argue that we need a theory of planning that better accounts for the nature of this teacher practice than offered by our historical and contemporary understandings.

## Traditional Research on Teacher Planning

Traditional planning research tells a story neatly summarized as follows: according to learning goals and objectives, classroom teachers make decisions about activities and assessments; they organize these plans by scope and scale into yearly, unit, weekly, and daily plans; and that planning is guided by content and organized into a curriculum. This tidy answer rests upon two underlying assumptions about planning: 1) that it is product-oriented, and 2) that a plan results from individual decisions made within school-bound variables. This section explores a historical trajectory of the two assumptions and outlines the role of research design in maintaining them.

**Planning as creating "a plan."** If the goal of planning is to create a guide for implementation, then two questions arise: What characterizes the plan? And, how do teachers go about creating it? Both theorists and researchers have defined formalized lesson plan components and suggested ways of going about determining those components.

The archetype of behavioral models of planning originated with Tyler's (1949) four-part model for planning lessons: choosing objectives, selecting learning activities, organizing those activities, and evaluating the students' experience. While Tyler considered his a conceptual model, it was (and still often is) taken up as a sequential model for lesson planning. Zahorik (1970), the first to argue that Tyler's model was inaccurate and unhelpful to describing the work of teachers, conducted a study (Zahorik, 1975) that explicitly countered this 'start with objectives' model and found that teachers' order of decisions varied.

In a planning rationale described as inductive, driven by learners and context, Taba (1962) outlined a seven step process for planning. Called the Taba Rationale, the steps started with diagnosing needs, moved to formulating objectives, selecting content, organizing content, selecting learning experiences, organizing learning experiences, and then selecting what to evaluate and how. Critics of the Taba Rationale make similar arguments to those opposed to the Tyler rationale - that it is linear, cause-and-effect based, decontextualized from social context, and maintains an illusion of timelessness (Hunkins & Hammill, 1994).

A well-known figure in teacher planning research, Madeline Hunter, proposed Mastery Teaching, an approach to instruction that outlined specific features of a lesson intended to lead to student achievement. The named features - anticipatory set, objectives, input, modeling, checking for understanding, guided practice, and independent practice - were quickly taken up as a "Seven Step Lesson Plan" or "Hunter Model." Many decried such a static framework; there was significant pushback on whether or not it was effective for increasing student performance (Slavin, 1989) or applicable to all content areas (Berg & Clough, 1991). Hunter (1985; 1991) disputed these arguments by stating that every lesson was never meant to include all seven components, but instead the features should act as *considerations* during the planning process.

Studies within planning research reflect a similar emphasis on components of the lesson plan. A sampling of research questions includes: To what extent do teachers select and clarify objectives; reflect on the learners' abilities, learning styles, and other characteristics; and select instructional strategies appropriate to objectives and learners (Peterson, Marx, & Clark, 1978)? Do teachers orient towards objectives (Popham & Baker, 1970; Goodlad & Klein, 1974)? To what extent do two experienced teachers use the systematic techniques in their written and mental planning practices (Reiser & Mory, 1991)? And, in the first year of teaching, what changes with regard to the models used to plan and what factors affect planning (Sardo Brown, 1993)? These researchers focused on components of traditional lesson plans, perpetuating a restricted understanding of teacher planning.

Reviewing the trajectory of this literature on lesson planning helps us see similarities in contemporary planning frameworks. This includes Understanding by Design (Wiggins & McTighe, 2005), an approach to unit-oriented planning according to expansive essential questions and working backwards to design for student understandings. Universal Design for Learning (Meyer, Rose, & Gordon, 2014), a set of three evaluative tenets, suggests that teachers consider multiple modes of representation, modes of engagement, and modes of action and expression as they create and evaluate their plan. Neither of these frameworks asks what teachers *do* when they plan, but instead each proffers a particular construct for teachers to use *as* they plan.

**Planning as individual decision making at school and for school.** Most of the literature on teacher planning focuses on the teacher as an individual decision maker. Dominated by the notion that planning is something that teachers do by themselves and in their head,

researchers have spent significant time attempting to investigate mental cognition as the overriding planning phenomenon (cf. Clark & Yinger, 1979).

In a well-known and respected review on teacher thought processes, Clark and Peterson (1984) collected and synthesized research on 1) teacher planning, 2) the models used to describe its process, 3) teachers' thoughts and decisions, and 4) teachers' beliefs, values, theories, and principles. This expansive review of literature enabled the authors to argue that teachers' thinking, planning, and decision-making is the center around which a curriculum is interpreted and acted upon. By expanding on the visible and reported behavior of teachers, they explored how teachers' implicit ideologies and assumptions played out in planning for, and engaging in, instruction: “the thinking, planning, and decision making of teachers constitutes a large part of the psychological context within which curriculum is interpreted and acted upon and within which teachers teach and students learn” (p. 4). This emphasis on the mental work of teachers continues through definitions of planning from the 1980’s to 2002 (see Table 2.1). Through the definitions, researchers focus squarely on teachers’ mental cognition and the school-bound variables that influence it.

**Table 2.1: Definitions of Planning**

| Author(s) | Term Used | Explicit Definition |
|---|---|---|
| McCutcheon (1980) | *Mental planning* | "part of the mental dialogue resembled a rehearsal of the lesson, an envisioning of what would happen. Part of the mental dialogue was a reflection on what had happened previously during the year or what had happened in other years when a similar lesson was taught" (p. 8). |
| Clark & Peterson (1986) | *Planning* | "the thinking, planning, and decision making of teachers constitutes a large part of the psychological context within which curriculum is interpreted and acted upon and within which teachers teach and students learn" (p. 4) |
| Bullough (1987) | *Planning* | "of simultaneously attending to and simplifying the demands of content, standardized curriculum expectations, available resources and materials, and… pupils' interests and abilities" (p. 246). |
| Miller (1991) | *Planning* | "focuses not on the interpretive content to be learned, but on the processes of reading and thinking to be internalized" (p. 56). |
| McCutcheon (1995) | *Deliberation* | "the process of weighing the many possible resolutions to problems and the many matters that vie for attention, affect the curriculum, and otherwise shape teachers' decisions about what to teach in order to act in their students' best interests" (p. 3). |
| McCutcheon & Milner (2002) | *Planning* | "a very active process… planning is also primarily a cognitive enterprise where teachers create mental images of a plan to guide their actions" (p. 82). |

While planning has often been characterized as happening in isolation from other people, some research in curriculum planning provides an opportunity for considering group and solo deliberation. McCutcheon (1995) presented nine characteristics of deliberation, including envisioning potential actions and outcomes of possible solutions and actions, acting within time constraints, and considering deliberation as a social enterprise. She noted that a quality missing from deliberation literature was "when people deliberate, many things simultaneously vie for their attention as they think and speak" (p. 5). With this said, her work on group deliberation

focuses on district-level curriculum decision making, not on how individuals within a group decide how a curriculum will play out in their classrooms.

Even in robust qualitative studies that take place over time, overriding notions of school-bound variables occlude the ongoing planning work of teachers. Applebee, Burroughs, and Stevens (2000) studied high school literature curricula in two schools, tracing how eight high school English teachers of varying grade levels planned for units, semesters, and the year. Observations took place in 19 classrooms, representing 32 semesters of English teaching in various tracks. A three-level curriculum lens - the planned, the enacted, and the received – was used to analyze teacher interviews, classroom observations, classroom materials, student interviews and student work. Despite this wealth of data, the authors spend little time on teachers' planning practices, attributing the "little overt attention to curriculum construction" to the teachers "doing familiar things in familiar ways, drawing on long established routines and familiar materials to shape what they were doing" (p. 424). By flattening the planning work of teachers to routines and familiarity, the authors miss the opportunity to consider the *orchestration* of those routines and materials implemented differently based on expertise, distribution, and student response.

A final entry point for teacher decision making for-school-and-in-school recruits school timelines into the research design. Yinger (1979) studied an elementary teacher over the course of five months, specifically examining her "preactive" planning time, the purposeful quiet time during her planning periods, before school, and after school. He found that the teacher used activities as a basic structural unit of planning, and also established and relied on various routines - from in-class routines for instruction and management - as well as executive planning routines that patterned across yearly, unit, weekly, and daily planning. Clark and Elmore (1979) studied

the first three weeks of school for five elementary school teachers. The authors conducted retrospective interviews on the foci, thoughts, and events that influenced the teachers' plans, during which they used plan books, class schedules, and other documents to aid the reconstruction of the teachers' planning. The authors found that teachers organized their planning in relation to students, environments, and time-of-year, not merely the markers of the Tyler/Taba/Hunter rationales.

The studies described above also reveal how *researchers* have been working along the basic two guiding assumptions: 1) that it is product-oriented, and 2) that a plan results from individual decisions made with respect to school-bound variables alone. Researchers ask teachers about their planning in pre-organized chunks of yearly, unit, semester, weekly, and daily plans (McCutcheon & Milner, 2002; Sardo-Brown 1990, 1993, 1996). Peterson, Marx, and Clark (1978) asked teachers *not* to plan at home, a methodological decision that explicitly addresses potential contexts of planning. Even as Yinger (1979) and Clark and Elmore (1979) leveraged school-based time frames, they maintained the primacy of school boundaries. By drawing such explicit boundaries along these school-bound variables, there has been little opportunity for attention to relationships across contexts, multiple purposes and multiple audiences at play, or even acknowledgement that teachers might plan during the previous school year, the summer, at home, or in any other time-space but during the school day while at school.

**Broadening Perspective to Include Contexts and Purposes of Planning**

If the mainstream literature on teacher planning narrowly focuses on creating a plan by making decisions about school-bound variables, it is instructive to look at the few studies that do not follow this narrative. Often, this research includes more robust accounts of teacher practice told through the voices of practitioners. At points, it recognizes the unfinished and tenuous nature

of planning. Here, I explore a selection of studies that orient towards student-responsive goals, acknowledge contradictory and unsolvable everyday dilemmas, and note the miscellany of teaching that are not included in the mainstream narrative.

There is a longstanding history of work that explicitly challenges top-down templates by documenting the tensions and contradictions of those templates in classroom life (Zahorik, 1970). In a study surveying 33 teachers, Sardo-Brown (1990) investigated self-described planning decisions of teachers in one district where the requirement was to use the Madeline Hunter model of lesson planning. Sardo-Brown found that teachers used the model in a more flexible manner than it was outlined, and in ways that intentionally allowed for wide ranges in student ability, other district initiatives, and interruptions in school schedule. Carrying on that tradition, Bilspinghoff, Hubbard, and Power (2002) conducted a self-study after moving from elementary school to a middle school that required the use of the STOPE planning model, a linear template that focused on Subject, Topic, Objective, Procedure, and Evaluation. She described the tension between the model and her classroom life: “no matter how hard I tried, I couldn’t look up at my students and look down at a STOPE plan and see a resemblance to real days with real children for real literacy” (p. 123).

There is a clear tension between what is planned on paper using templates and the reality of classroom implementation. For example, in a study of three English teachers, Owen (1991) looked at the relationships between what teachers planned and what happened in their classrooms. The teachers’ principal required that written plans be handed in each Friday, but this form of representation didn't capture what the teachers had planned, their intentional flexibility, the routines they had in place, or the spontaneity of their planning practices. One participant, Mary Auden, reflected on what she doesn’t include in her written plans: "My lesson plans don't

say that I'm going to tell a story or an anecdote. I don't put that in, but they are the things that relay the common thread" (p. 58). Mary's emphasis on the "common thread" that informs her class points to the importance of representational choices. In this sense, planning is both the represented written plan *and* the unwritten, multifaceted, and responsive intentions.

Practitioners also plan opportunities to intentionally open up space for students to shape what happens in class (Coon, 1991; Smith, 1943). Miller (1991) traced one high school English teacher's "planning for spontaneous performance" (p. 51). The teacher's planning, both anticipatory and evolving, was rooted in her belief about the importance of student response and using the experiences of the curriculum to develop those responses. Her strong goals, as well as openness to discovery, provided opportunities for students to bring in "discovered texts" and these texts became a part of the fabric of the classroom tapestry. This planning for openness can happen in shaping curricular materials too. McCutcheon and Milner (2005) studied a high school English teacher who "devotes about two weeks each summer to planning each course, re-designing some courses on the basis of his previous year's teaching of them, recreating a textdisc [CD-ROM] for each course and locating relevant videotapes for the course… [by doing so] he strives to have `an improvisatory nature to discussions in class'" (p. 85).

Teachers also make decisions about – and physically change - their embodied environments (e.g., desk arrangement, instructional materials on display, family pictures on their desk), decisions that are intentional and also that evolve. Atwell (1987), in establishing writing and reading experiences for middle school students, emphasized time, ownership, and response in planning for writing instruction. Her own preparation, especially before students arrived, was an important part of this planning: "I organize this environment beforehand, establishing my classroom as best I can as a place that invites and supports writing process so when my students

arrive they'll find what they need to become writers" (p. 54). Even with the best-laid intentions, classroom situations arise that ask teachers to make decisions and manage contradictory goals and situations. Lampert (1985) described a situation where her 5th graders had divided into groups of boys and girls, at opposite ends of the classroom. As she thought through the implications of multiple possible ways to manage this social division, she used the next unit as a way to answer the present dilemma:

> While I taught the class, my thinking about the boys and the girls merged with my thinking about some other currently pressing matters in the classroom. I was about to begin a new instructional unit which involved using manipulative materials and had been wondering about how to organize the students' activities with those materials. I had also been talking with my student teacher, Sandy, about ways in which she might take on responsibility in the class. We had planned the next unit together, and she was prepared to do some of the teaching. So I divided the class into four small groups (two of girls and two of boys) and put Sandy in charge of instructing and managing one group of boys and one group of girls, while I took responsibility for the other two groups. This strategy depended heavily on specific elements in the context of my classroom. (p. 184)

Through this rich description, Lampert considers a variety of features of current and upcoming instruction, negotiating them in relation to each other and the physical, emotional, and identity work at play.

In addition, there are tensions that teachers must negotiate in their wider school context. McCutcheon (1980) describes school factors that affected teachers' abilities to carry out their plans, including material constraints. Some were related to access and technology, such as the

teacher who wanted to use a particular ditto about Galileo, but wasn't able to get it copied because the ditto machine was controlled by the office and they were only supposed to be dittoing textbook materials. Teachers also noted a disconnect between the teachers' planning and the expectations of the administration, and a disconnect between plans teachers used for themselves and what they constructed for substitute teachers. McCutcheon's study serves as an excellent long-term exploration of the materials, emergent situations, and institutional policies that shaped these elementary teachers' planning practices.

**What is Not Accounted for in the Research on Teacher Planning**

It has been 15 years since any major study on teacher planning has been published (McCutcheon & Milner, 2002). Since then, multiple features of the educational landscape have emerged for which the existing literature on teacher planning fails to account. Here, I present three contemporary areas of research in which we see situated teacher cognition, but no attention to the relationship of cognition to planning for instruction.

**Teachers' technology use.** The decline in studying planning coincided with a rise in the study of 'design.' Reviewing the literature on instructional design, a field rooted in considering causal relationships with technology, studies often treated technology as a separate variable for teachers to consider (or not). For example, some researchers attended to teachers' beliefs about technology generally (Hennessey, Ruthven, & Brindley, 2005; Kim, Kim, Lee, Spector, & DeMeester, 2013; Palek & Walls, 2009; Wozney, Venkatesh, & Abrami, 2006), and others focus on teachers' attitudes related to technology in their content area (Howard, Chan, & Caputi, 2014; McGrail, 2005; 2007). Multiple researchers attempted to characterize factors related to teachers' technology integration (Inan & Lowther, 2010; Mumtaz, 2000), including those that affect writing instruction (McIntyre, 2013). Many researchers have asked why teachers do not

incorporate technology into their instruction (Cuban, Kirkpatrick, & Peck, 2001), resulting in a line of research regarding barriers to technology integration (Hew & Brush, 2006; Honan, 2008). Using another entry point, that of intervention studies, researchers have considered whether or not a technology professional development session led to innovation (Hughes, 2005) or whether a second lesson improved after videoing it and debriefing it (Yoon, Ho, & Hedberg, 2008), or how specific technologies, like iPads, act as an entry point to understanding teachers' thoughts on their practice (Rowsell, Saudelli, Scott, & Bishop, 2013). This body of literature uses retrospective methodologies (surveys, interviews, focus group interviews) or variable-dependent intervention studies to characterize questions of practice. Together, their findings generally occlude classroom time scales, contexts of decision making, and out-of-school situations, reinforcing many of the critiques I've made already about traditional planning research

In an attempt to characterize teacher knowledge, Mishra and Koehler (2008) built upon Shulman's (1986) work at the intersections of content knowledge and pedagogical knowledge to add technological knowledge. In studying their own courses, consisting of a mix of practicing K-12 teachers and higher education instructors, they developed the Technological Pedagogical Content Knowledge (TPCK) framework to describe teacher knowledge. This framework acts as a useful way to identify opportunities for using and developing TPCK (McKenney, Kali, Markauskaite, & Voogt, 2015) and relationships between teacher knowledge and beliefs about technology determine whether a teacher decides to teach with technology (Voogt, Fisser, Pareja Roblin, Tondeur, & van Braak, 2012). With this said, TPCK, as an evaluative tool, is not a helpful framework to use in describing practices - what teachers *do* when they plan and how they do it. Based on the tenets of TPCK, Hutchinson and Woodward (2014) proposed a sequential planning cycle, a prescriptive model starting with instructional goals and moving through

instructional approach, tool selection (at which a branch off of the cycle indicates "exit if using pencil and paper only"), contribution to instruction, constraints, and instruction. Considering technologies as only digital devices, this model serves as a shallow characterization of teachers' planning processes.

Making the case for the teacher's role fostering a supportive and sustaining pedagogy *with* digital technologies, Philip and Garcia (2013) call for an increased focus on developing intentional support for teachers. Tracing a long history of new devices in classrooms as part of an ideology of replacing the teacher, they write: "The just-add-technology-and-stir fallacy is especially problematic in how it frames educational issues as needing a short-term investment in devices or curricula rather than a longer-term investment in teachers and teaching" (p. 316). Considering the rapid increase of digital technologies in schools and our lack of knowledge regarding how teachers incorporate them successfully, we must better understand how teachers use technology in their own planning practices. Thus, future studies need to combine and extend our understandings of the intersections of planning and technology.

**Teachers' literate lives.** A research-occluded but practically-undeniable truth is that teachers plan beyond the physical boundaries of school. McCutcheon (1980) noted that teachers often talked about their mental planning happening in out-of-school spaces, like watching Monday Night Football, “during an odd moment” like walking or driving, or talking shop while having a beer with colleagues. In a ‘Teacher to Teacher’ column (Alexander-Smith, Rice, & Johnson, 2001), teachers shared their summer vacation practices that helped them enter the school year, including how they reflect, process, and plan ahead for the upcoming year by reading books, attending conferences, taking trips, and engaging in professional conversations.

If we trace how teachers' literate lives are recruited into their classroom practice (Bomer, 2011), we can turn to how professional development might affect teachers' planning practices. The research on professional growth helps us see a variety of teacher activity. Self-sponsored writing practices inform classroom practice as teachers re-appropriate and re-contextualize texts and talk (Woodard, 2015). Narratives of change within a supportive summer professional development space led to self-identified "transformation" (Whitney, 2015). Following one teacher along a trajectory of her participation with digital tools, Hicks (2014) found that the teacher asked students to compose in ways that were affected by her own composing practices. Digitally-mediated professional learning, such as Twitter, can provide teachers with opportunities to access novel ideas, help them stay abreast of education advances and trends, and connect them with both like-minded and diverse perspectives (Carpenter & Krutka, 2014; 2015). Taking these findings, we need to attend to their implications for teachers' planning practices.

**Responsive pedagogies.** There has been a recent push to focus on what youth are doing in non-traditional school assignments and experiences, from multimodal composition to youth participatory action research (YPAR) and project based learning. Knowing such narratives exist is an important start, but I call for the addition of understanding how the projects came to be in addition to what occurred during class time and the products that were created.

A range of studies describe students' multimodal composing practices. Vasudevan, DeJaynes, and Schmier (2010) tell the story of Marie, an 8$^{th}$ grade student who blogged regularly but, framed as resistant by the print-only strictly mandated parameters of her English class, took up a podcast project in Media Communications to critique the educational opportunities not available in her under-resourced school. Jocius (2013) detailed students' intentional choices in videos about *The Kite Runner* as they marshaled visuals, sound, and audio to fulfill multiple

purposes, including meeting the standards within their academic setting, entertaining their peer audience, and furthering their understanding of the novel. Ranker (2008a, 2008b) studied two fifth grade boys composing with video and detailed how the medium provided a dialogic context for their ongoing inquiry. These rich studies provide multiple examples of students' opportunities in their classes, but the back-end decision making, material orchestration, and other markers of teacher planning are not mentioned.

Thinking outside of traditional classroom dynamics, Morrell, Dueñas, Garcia, and López (2013) followed youth as they created multimodal, digital compositions within the contexts of their high school classes. Explicitly named as participatory action research, the authors shared narratives of teacher intentions and of what happened in the class, but don't describe the teachers' planning practices that supported the students' engaged and reflective composing with digital means.

**Moving forward.** After reviewing this literature, the opening vignette becomes simultaneously clearer and more complex. Yes, there are traditional planning practices throughout the initial excerpt - the teachers are planning a unit, revising objectives within a planning template, deploying knowledge of students, and orienting towards disciplinary literacy. At play are also collaborative relationships, partial planning as the teachers invoke experience, other people, multiple types of texts, and their relationships with students. They use digital technology in the form of Google Docs and they draw upon their literate histories when they articulate literary preferences and knowledge of popular culture texts. As we move forward to study teachers' contemporary planning practices, we must use a theory that encompasses these currently disconnected fields of inquiry and foregrounds teachers' planning activity. Simply put, we can't see all of the work teachers do without a broader lens with which to view it.

## Theoretical Framework

To consider teachers' planning activity, I turn to Cultural Historical Activity Theory (CHAT). Broadly, this theory provides a framework with which to situate human activity in context. Prior et al. (2007) explain that CHAT places activity "in concrete interactions that are simultaneously improvised locally and mediated by historically provided tools and practices" ("What is CHAT?"). I use CHAT to attend to teachers' literate activity in interaction with their environments; both their literate activities and environments are mediated by local and historical tools and practices.

To do so, I assemble a three-part theoretical frame. First, I outline planning as a form of literate activity (Prior & Shipka, 2003), recognizing the ways teachers' texts and talk are motivated, mediated, and distributed across different contexts and with multiple purposes. Second, I turn to planning as mediated action, where teachers are individuals-acting-with-mediational-means (Wertsch, 1991; Wertsch, Tulviste, & Hagstrom, 1993). Doing so enables me to ask about who is planning, what mediational tools teachers draw into their planning practices, what voices are invoked in the course of planning, and the patterns of opportunities that teachers make available for students. Finally, I consider planning as distributed cognition, building on the work of Hutchins (1995), who argued that cognition is spread out through systems via tools, situations, and people, accomplishing cognitive acts that individuals do not do by themselves. At the intersection of these three lines of thought, I am better able to look at the nature of teachers' planning across and within multiple contexts.

### Planning as Literate Activity

Planning is a core teaching practice. Practices can be traced in literacy events, situations in which individuals create texts and talk. Traditionally, however, the research on teacher

planning has framed texts (i.e. lesson plans, novels, standards) and talk (i.e. teacher-teacher, teacher-administrator, teacher-student, etc.) as separate from each other. That body of work has ignored common teacher practices at the intersection of texts and talk, including sharing resources, modifying texts for specific audiences, and discussing with colleagues how the lesson, texts, and/or resources could be improved. In my effort to recognize the interplay between texts and talk, study the contexts they take place in, and trace how this happens over time and space, I take planning as a form of literate activity (Prior, 1998; Prior et al., 2007). This entry point enables me to see and name the mediated, situated, and distributed nature of teacher planning.

In a move to expand analytical and conceptual bounds, Prior (1998) argued for understanding writing as literate activity. Previous writing research had focused closely on texts and talk, but he argued that that "literate activities [are] located not in acts of reading and writing, but as cultural forms of life saturated with textuality, that is strongly motivated and mediated by texts" (p. 138). Similarly, I position planning as a cultural activity, where teachers' practices result in and are motivated by various textual forms. This is especially important as I expand the boundaries of texts beyond those that individual teachers create, to also consider various texts-and-situations (like yearly evaluations and departmental in-service days for unit planning) that very much affect teachers' planning practices.

Teachers create many texts in the course of their planning. They may revise a departmental unit plan, sketch classroom arrangements, compose a worksheet for student use, and prepare directions for peer response. Looking more closely at teachers' processes of creation provides opportunities to trace markers of literate activity, including production, representation, distribution, and reception (Prior et al., 2007). With these guides, I look at what teachers produce, how they represent their choices, how/when/where they distribute what they've created,

and the roles reception plays in ongoing planning. Parsing these is not meant to separate them into stages, but to recognize them "as co-present dimensions of discourse with multiple and changing configurations over time" (Prior, 2009). I am interested both in the texts teachers create as well as how and why they go about creating them, a dual focus that challenges the primacy of traditionally-recognized texts and attends to the variety of forms used within teachers' planning practices.

When teachers invent for classroom instruction, they invoke past experiences and settings as they anticipate how their plans might play out in their specific classroom. To understand this relationship between time and space, I turn to laminated chronotopes (Prior, 1998; Prior, 2010; Prior et al., 2007; Prior & Shipka, 2003). Briefly, chronotopes (Bakhtin, 1981) are embodied and representational worlds that inherently combine the concepts of space and time. So, instead of attending to space and time separately, they are considered as a space-time unit. That chronotopes are laminated means that there are multiple, simultaneous purposes, social frames, and footings at play. Laminated chronotopes help me look at how teachers draw upon experiences, how they anticipate their plans playing out, and how they navigate multiple (perhaps competing) goals and purposes within and across various contexts. This complex framing counters traditional goal-oriented notions of teacher planning and foregrounds the multiple, embedded purposes of the artifacts that teachers might be using.

**Planning as Mediated Action**

As they plan, teachers use multiple means at their disposal. They may write notes in plan books in between periods, rehearse their opening activity on the drive to school, or participate in a weekend conference where they talk through an upcoming unit. Each of these situations highlights multiple tools teachers use to plan, from texts to processes. Thinking broadly about

these tools, and the multiple contexts within which they are used, leads me to Wertsch's (1991) theory of mediated action.

Wertsch (1991) argues that individuals are always acting with mediational means, selecting among those available to them. He defines mediational means as instrumental tools that individuals use within cultural, historical, and institutional contexts. Mediated action can be external or internal, using psychological tools and/or technical tools; but these tools can never be separated from their contextual use. This perspective has important implications for broadening my unit of analysis beyond a siloed individual - now mediated action becomes the unit of analysis, and the individual teacher is the relevant agent of this action.

Wertsch combines the developmental work of Vygotsky and the social semiotic work of Bakhtin to consider activity with mediational means and sociohistorically situated processes. From Vygotsky, he takes genetic transformation of learning and growth and psychological tools as meditational means. But he finds Vygotsky incomplete when it comes to making meaning in context. From Bakhtin's work he draws upon social meaning, semiotics, and the question "who is doing the talking?" (which is answered with at least two voices).

At the heart of Wertsch's theory is his metaphor of the toolkit as mediational means. These means don't exist in the abstract, instead only "as part of action do mediational means come into being and play their role" (1991, p. 119). When adapted for use with teachers' planning, the toolkit metaphor accounts for why a teacher might employ one of several possible mediational means on a particular occasion. As occasions accumulate and patterns develop, I attend to the particular means teacher privilege (or not) in their planning practices. My questions become, which ones? When, and how?

In an individual's toolkit, language is one important mediational means. Individuals take up each other's voices as they develop social languages, engaging multiple voices they have encountered. By recognizing the heterogeneity of language, we resist normative labels (e.g., "teacher talk") that might homogenize speech that is actually full of diverse voices. For example, in the planning process, teachers might draw upon the voices of students, parents, administrators, standards, or even fictional characters, popular music, or current events. More broadly, their utterances might invoke more collective voices, in the form of speech genres and social languages. Acknowledging this polyvocality in question form, it becomes useful to ask, "who is doing the planning?" Specifically, this question helps me attend to how teachers are invoking students and student voices as part of their planning process.

While Wertsch (1991) focuses on language as a mediational means, Shipka (2007) takes up his later work on mediated action and considers it in light of composing more broadly. She synthesizes his explanation of mediated action into four properties: mediated action typically serves multiple purposes or goals; mediated action is simultaneously enabled and constrained by mediational means; mediated action is historically situated; and mediated action is transformed with the introduction of new mediational means. Shipka's work frames questions such as: What and how are mediational means enabling and constraining particular kinds of work within the planning process? And how does the introduction of new mediational means affect planning? These properties clearly build on literate activity as well as extend Wertsch's mediational means to focus on material and digital tools.

**Planning as Distributed Cognition**

Teachers plan across and within various contexts. Some of these might be familiar (planning periods, department meetings) while others less so (while doing laundry or watching

television). They also participate in ongoing institutional work such as updating curriculum maps or serving on standards committees, and sometimes engaging in professional development such as attending a summer professional development event in another state. We need a theory of planning that accounts for how teachers' activity is distributed within *and* across the multiple contexts they inhabit. With this intention, I turn to Hutchins' (1995) theory of distributed cognition. Hutchins argues that cognition is a socially and culturally distributed process where participants have roles that play out in tasks and where cognition is accomplished in action. Teacher planning, as distributed planning, positions teachers, their tools, and their functional systems as working together to accomplish the ongoing work of preparing for classroom activity.

Hutchins argues that cognition must be studied in its naturally-occurring situations in order to see "how people go about knowing what they know and of the contribution of the environments in which the knowing is accomplished" (1995, xii). Like Wertsch, this essential connection to situated practice frames a unit of analysis that considers the individual as inextricable from their context and their activity as inseparable from interconnected mediated processes. By softening the boundaries between inside, outside, individual, and context, Hutchins encourages us to pay attention to what is being accomplished and how. In a complement to laminated chronotopes, Hutchins encourages attending to time as part of context; he warns against cutting arbitrary boundaries according to time, as doing so could risk cutting pathways that leave things inexplicable.

Hutchins (1995), like Wertsch and Prior, sees an essential relationship between cognition and mediating artifacts brought into coordination in the performance of the task. Looking at this coordination could index how artifacts might end up shaping teacher plans (and sometimes working against them). We can also look to what teachers create as they coordinate the

performance of planning, and their design choices in the process. Pea (1993) writes “while it is people who are in activity, artifacts commonly provide resources for its guidance and augmentation. The design of artifacts, both historically by others and opportunistically in the midst of one's activity, can advance that activity by shaping what are possible and what are necessary elements of that activity” (p. 50). Pea’s attention to the making of artifacts resonates with the markers of literate activity and with Hutchins’ emphasis on contextual cognition, all of which converge on the importance of studying situated teacher planning practice.

With this broader view of cognition, we can better consider the nature of teachers' distributed memory and how they draw upon that memory as they plan. Instead of presuming a 'blank slate' notion of planning, we can ask "what ways is information present in representations of the system, both in textual representations and in individuals’ minds?" For example, if a teacher is planning a course for the second time, she might flip through a folder of unit resources, watch again a video that students made the year before, set up a series of collaborative planning meetings with a colleague, and/or construct the shell of a blog she will use to model and facilitate the unit. These select examples, dependent on text and talk and incorporating a variety of representations, reveal multiple roles of distributed cognition beyond 'all in the teacher's head.' Teachers' distributed memory - and the systems they leverage and develop to accomplish their goals - also have implications for thinking about how teachers use space-and-time as a resource in their planning.

**Conclusion**

Cutting across planning as literate activity, mediated action, and distributed cognition, I am able to draw analytical boundaries that don’t cut off activity that influences teachers’ planning. I am able to acknowledge the individual but broaden the analytical unit to encompass

their-action-with-mediational-means and their role(s) within functional systems. I am also able to attend to how they accomplish their activity and how mediation is orchestrated within and across contexts, which helps soften boundary work when framing offline/online activity.

All three of these theories invite a more holistic framing of the work of teacher planning and situate it in everyday practice. With their guidance, I am more alert to histories and ideologies of artifacts, especially of technologies. And I am able to continue thinking about time in relation to planning, instead of taking it as a given; I'm able to attend to how it's used, shaped, framed, drawn upon, and drawn into relation. Lastly, I am able to attend to routines, dispositions, and expertise that have significant consequences for opening up opportunities for students' experiences. My experiences using these theories will enable others to build off of my work.

Even with their overlaps, the three entry points foreground my current and future work. Literate activity brings a particular attention to audience in the acts of composing, specifically looking at the role reception plays in planning. This is clearly oriented to asking how teachers plan with multiple audiences in mind, primarily students (who, ever dynamic, are also developing, arriving, leaving, challenging, and creating in response to their own variety of factors). Mediated action attends to how patterns of privileging affect dispositions, and that these dispositions develop over time. This is especially important as teachers plan in various configurations and with various resources in their developing repertoires. And distributed cognition gives me a way to characterize contexts and systems as inherently helping teachers do the work they do, specifically asking what kinds of systems do they set up for themselves to do the work they want to do, and types of situations schools provide for them. This is especially interesting (and important) as teachers navigate evolving and emerging technologies in relation to their established routines.

**Research Questions**

Surveying the literature of teacher planning, I noted opportunity for close work that attends to teachers' roles in anticipating classroom events and inventing for classroom instruction, the complex trajectories that inform that work, and the unfolding context that evolves over the course of time. Informed by these opportunities, and by the gaps I saw - practically, theoretically, methodologically - I turn now to the research questions that framed the study:

- How do teachers plan for classroom instruction?
    - How do teachers describe their own planning practices?
    - What practices, factors, people, and situations are drawn upon - and drawn into relation - as teachers plan?

# CHAPTER 3

# RESEARCH DESIGN AND METHODOLGY

Much of the framing of teacher work has been around individual teachers in isolation (think aloud protocols) or their perspectives on the abstract (questionnaires about planning processes, especially retrospective ones). Some later studies combine these methods to provide context and insight to the nuanced dynamics of teacher planning. However, the bulk of studies of teacher planning fall short in how their methods consider the complexity of teachers' planning practices. In this chapter, I describe the present study's research design and methodology. I provide a rationale, review the study's purpose and overarching researching questions, and summarize the pilot study that informed this work. I move to introducing my participants, then articulate my data collection, data analysis, and data synthesis methods.

## Rationale for Design and Methodology

I used qualitative methodology to better situate and understand teachers' planning work in concert with their particular contexts. Drawing together semi-structured interviews (Merriam, 2009), participant observations (Spradley, 1979), and artifactual analysis (Pahl & Roswell, 2010), I was able to trace situated and descriptive accounts of planning. Looking to document "the human experiences of others or of oneself in social action and reflexive states" (Saldaña, 2011, pp. 3-4), I collected qualitative data in multiple forms, including writing field notes (Emerson, Fretz, & Shaw, 1995) and gathering artifacts of planning and instruction (Bogdan & Biklen, 2011). These were meant to work in concert with each other to trace multiple trajectories of teachers' planning.

I was attentive to collecting representations of teachers' artifacts of planning. These included physical plan books, digital plan books, post-it notes on curriculum guides, classroom

posters, websites, Google Drive folders, Google documents, and more. I captured digital representations of these primarily by pictures and screencaptures. This attention was shaped by my sensitivity to the oversight of previous methodologies that rarely attended to the texts that teachers create for themselves. In addition, the research also omits any mention of what teachers make for students. By make, I mean teachers' creation of artifacts that mediate their own planning and/or mediate student learning. As I included both text types into my data collection, I did not want to merely list all of the handouts, prompts, assignment sheet, etc, that a teacher made. Instead, these artifacts became rich catalysts for storytelling about planning practices, and a set of examples for how planning is distributed across texts, people, and platforms.

This study spanned the course of a school year, with data collection starting in September, a time when teachers were preparing to start the upcoming year. This study was informed by a pilot study, conducted with IRB approval, of a semester's worth of data.

**Pilot Study**

In Spring 2016, I completed a small-scale case study of one teacher as she taught a new-to-her instructional unit. The focal participant, Jessica, had taught sixth grade for five years. She worked closely with another sixth grade teacher, Amanda (who was in her first year of teaching) and acted as the cooperating teacher for a pre-service student teacher, Bea. In the study, I articulated four main findings. For these teachers, planning involved: 1) making choices about texts in relation to students, specifically in relation to how students might take up the text; 2) drafting language in relation to medium, specifically when envisioning how students might interact with the language and text, 3) inscribing language for future use as part of a textual system that the teachers relied on for their collaborative document creation, and dissemination;

and 4) collaboratively creating student artifacts, suggesting that planning practices are highly contextualized and collaborative.

I found that this process of making – of both situations and of texts – consistently relied on two interrelated processes: anticipating and inventing. Anticipation, the process of playing with potentials, was consistently tied to envisioning how a proposed situation/resource/text might work with students as well as envisioning future situations that would enable teachers' planning. Invention took place as teachers 'made' the material world through their engagements with varied processes, products, and purposes. In this study, invention served to develop constraints, finalize language in a chosen medium, decide what would happen based on classroom routines, and create texts for students. Anticipation and invention consistently informed each other, as they were both based on experiential knowledge of classroom histories, what students would find difficult or unclear, and shared understanding and use of systems (digital, scaffolding heuristics, etc.).

The findings of this pilot study fundamentally informed my current theoretical model. They were a first pass at attending to the complex trajectories of talk and text in situated practice. Each finding enabled me to consider how teachers voice themselves, students, and others, laying a foundation for what I later recognized as part of all three elements of my theoretical model. Through ongoing analysis in this study, what I called 'anticipation' morphed to 'envisioning,' as I noticed how often teachers talked about seeing and what a scene might look like. 'Invention' stayed in wording, though I realized the practice was oriented less towards *what* teachers were making, and more towards *who* they intended the invention for. The interrelated, dynamic, non-linear nature of planning that I found in this pilot study is also mirrored in my working

theoretical model, as both studies considered the elements of the *process* (rather than, say, parse planning by specific *components* like attention to objectives).

**The Situated Researcher**

I have been interested in how teachers plan since high school. I remember Mr. Page's planbooks all laid out, as he mentored me as an assistant French 2 teacher. I remember Mrs. Andrews who talked about planning different things each year, even within a highly structured AP Psychology curriculum, because she didn't want to be bored. And, I remember how Mr. Robb made explicit his decisions that enabled us to make our own critical thinking choices - such as giving us a transcript of the movie rather than merely taking notes on it. While seemingly minor moments, these memories, intentions, and (what I would mark now as) textual arrangements fascinated me.

As a teacher, I have been interested in how to construct classroom experiences where students create knowledge, ask questions and are supported in answering them, and are invited to have multiple reasons to care about what we were doing. As a classroom teacher, I led professional development sessions on how to incorporate technology into the classroom, specifically with the lenses of project based learning and performance assessment. These lines of inquiry have led to thinking deeply about teacher learning, inquiry, and the conditions that support both.

It is important for me to acknowledge my strong commitments to both increasing equity in public schools and supporting teachers' capacity to sustain student inquiry. Affecting my work is a concern with the de-professionalizing of teachers, specifically as it relates to increasing numbers of digital devices in classrooms (Philip & Garcia, 2013). I hope that my research directs attention to teachers who are themselves ongoing learners in the everyday hard work of teaching.

These commitments certainly shaped the questions I asked and the ways I collected and analyzed my data.

## Participants and Settings

### Participant Selection

To find my participants (see Table 3.1), I contacted members of my local teacher networks. I reached out to the teacher I had done the pilot study with; to teachers in my local chapter of the National Writing Project, of which I have participated the last three years; and to educators who attend a local Social Justice Educators group, of which I attend the quasi-monthly meetings. I explained the study to them and gave them the participant consent form to review before they agreed to participate.

**Table 3.1: Overview of participants**

| NAME | GRADE AND SUBJECT AREA | EDUCATION | YEARS TEACHING |
|---|---|---|---|
| Kirra | Kindergarten | MA Early Childhood Education; Endorsements in Special Education and English as a Second Language | 15+ |
| Sahra | 4th and 5th grade content-based English as a Second Language | Ed. M in Curriculum and Instruction; Endorsements in ESL, ELA / SS Middle School | 11 |
| Cora | Students with Interrupted Formal Education | BA in Linguistics and BA in Romance Languages and Literatures; MA in French Linguistics; TESOL Certificate; Type 29 Bilingual Certificate | 4 |
| Elle | 6th – 8th grade English as a Second Language | Working towards MA in C&I with a focus in Language and Literacy; Endorsements in Bilingual and ESL | 5 |
| Jessica | Instructional Coach, former 6th grade English Language Arts teacher | MA in Curriculum and Instruction with a focus in Literacy; Working on Admin certification | 5 in classroom<br>1 as instructional coach |
| Eliette | 9th grade English<br>9th grade AVID<br>Social Justice Elective | MA in Secondary Education English | 14 |
| Amelia | AP World History (10th grade)<br>African American History Elective<br>Social Justice Elective | MA in Educational Policy Studies – Globalization in Education | 15 |
| Russell | 11th grade English<br>12th grade English | MA in Curriculum and Instruction | 10 |

**Participants.** Here, I give a brief introduction to each participant, ordered by grade level. Each participant is an experienced educator, ranging in years of experience from four to more than fifteen. They taught grades that spanned from kindergarten through 12th grade, and all but one of them had their Master's degree. Information included here is self-reported by the participants.

***Kirra.*** Kirra was a kindergarten teacher with more than fifteen years of experience teaching early childhood education and kindergarten. The year of the study was her 6th at her

school, and she was one of two kindergarten teachers. In addition to her classroom responsibilities, Kirra was a grade-level professional development leader, a building-level coach for Positive Behavioral Intervention and Supports, and a member of the school improvement team. Kirra was a lab classroom for the school's recently-adopted math curriculum and served on the district-wide social studies curriculum team. Kirra had earned endorsements in English as a Second Language and Special Education. A married mother of three boys, Kirra's youngest son attended the elementary school at which she taught.

***Sahra.*** Sahra was a 4th and 5th grade content-based English Language Learners teacher with 11 years of experience (10 of them teaching at her current school). Sahra maintained multiple professional collaborations, including a long-standing one with a local high school teacher and a local university professor. This collaboration gave local high school students opportunities to lead science experiments with Sahra's elementary students. During the year of the study, Sahra was recognized on the state and national level for her science instruction with students. A constant learner, Sahra was working towards becoming fluent in French.

***Cora.*** Cora was entering her fourth year of teaching, with all four of them at her current school. In the mornings, she taught Students with Interrupted Formal Education (SIFE) Newcomers and, in the afternoons, Kindergarten English as a Second Language. She was in charge of much of the administration for the Newcomers program and also served on the district's Equity Committee. In the year of the study, Cora collaborated with many adults, among them an instructional coach, the school's parent liaison, middle school ESL colleagues, and her building-based colleagues. Cora self-identified as white, European descent, bi-cultural, Jewish/Italian, low-income family, highly educated, gay, partnered, hailing from a different state, and bilingual+. She spoke French, some Spanish, some Italian, and some sign language.

***Elle***. Elle was a middle grades ESL teacher in her fifth year of teaching. Previously a Spanish Language Arts and Spanish as a Foreign Language teacher at the high school level, Elle had moved to middle school three years ago. During the year of the study, Elle worked on finishing her Masters in Curriculum and Instruction (Language and Literacy) and also had Bilingual/ESL endorsements. Elle also served on the PD Cadre and worked with across-district colleagues to run PD on the district's theme of Racial Equity. For the previous two years she had also coordinated the Bilingual/ESL programming offered at the middle school. Elle taught two ESL classes - one 8th grade and one 6th / 7th grade combination. She also co-taught two math classes with two different teachers, one in 6th and 8th grade respectively. The students in Elle's classes were racially, ethnically, and linguistically diverse, coming from countries such as Guatemala, México, El Salvador, Palestine, China, and the Congo. Her combined ESL class, which she was working on a novel unit for, was a fluid class with students coming and going throughout the school year. This occurs frequently since the children of visiting scholars to the nearby university arrive and leave the area with every semester.

***Jessica.*** During the pilot study for my dissertation study, Jessica was a 6th grade English Language Arts teacher in her 5th year. At the end of that school year, her school had an instructional coach position open, which she applied for and stepped into. In her role as an instructional coach, Jessica met with teachers in one-on-one and small group coaching, including co-planning, grading, and teaching, and providing targeted professional development both in support of the general curriculum and teacher requested topics. During this study, Jessica met with Elle to plan a novel unit for her 7th and 8th grade ESL class. She assembled and shared resources, scheduled the meetings, and participated in classroom co-teaching. Outside of school, Jessica had just finished her masters in Curriculum and Instruction with a focus on Literacy and

was in the first year of earning her administrative licensure, in addition to planning her wedding. Jessica self-identified as a 28-year-old White, middle-class woman with no children.

***Eliette.*** Eliette was a high school English teacher who had taught for 14 years, 4 of them at her current school. She taught 9th grade English, 9th grade AVID (a college readiness and success program whose acronym stood for Advancement Via Individual Determination), and the school's Social Justice Elective. Eliette was active in her school and community. She participated in her English Department Professional Learning Community as well as the district's Social Justice Educators' Collaborative monthly meetings. Eliette and her husband co-owned a business in town and she gave birth to a baby girl in the fall semester of the study. Eliette self-identified as a white female.

***Amelia.*** Amelia was a high school Social Studies teacher with 15 years of experience, all teaching at her current school. She taught AP World History (a 10th grade course), Social Justice Elective, African American History, and a Contemporary World Issues Elective. In addition to her classroom work, Amelia was an AVID site team member, a co-sponsor of the school's Social Justice Action Committee, a co-facilitator of RISE (Racial Identity Student Experience). She also facilitated a district-wide learning group called Social Justice Educators' Collaborative, which met monthly during the school year and participated in a book club during the summer. Amelia was married to a fellow teacher in the district and they had two young sons. Her oldest child attended the bilingual school in the district, and she was practicing Spanish with him. Amelia self-identified as a white, 37-year old female.

***Russell.*** Russell was entering his 10th year of teaching. Having taught in the upper Midwest, Texas, and two schools in the central Midwest, Russell was beginning his second year at his current school. An English major in college, Russell focused in poetry and drama, and he

received his Masters in Curriculum and Instruction. With the drama teacher at the other high school, Russell spent the previous summer co-designing the Theater I and II curricula. Russell's focus for the year was incorporating project-based learning into what he described as a fairly rigid curriculum (district-wide assignments, district expectations for final exams, and district-shared rubrics). He had experience with project-based learning in his school in Texas and had done some at his former school, where he had seen a disparity in experiences for his African American students. He described this as what sent him on a track to graduate school, asking questions about project based learning in traditional settings. Russell self-identified as white.

## Data Collection Methods

I worked with these eight teachers over the course of one school year. I grouped them into three 'sets' to enable data collection and data analysis. With the first set of teachers, I interviewed five participants (Kirra, Sahra, Cora, Amelia, and Eliette) in the later summer and fall of 2017. For the second set, I conducted participant observations of an instructional coach (Jessica) and an ESL teacher (Elle) as they worked together in weekly planning meetings over the course of the school year. For the third set, I interviewed one teacher (Russell) and collected screencasts from him as he sought to incorporate project based learning into his traditional school context in a span of six months. With these diverse yet complementary trajectories, I gathered a range of data that helped me consider the complex, multifaceted planning work of teachers. While I collected data for Jessica, Elle, and Russell into the spring term, analysis for this study is limited to fall semester.

### Data Sources

Through multiple means of data collection, I looked to trace teachers' practices and configurations that shaped their planning. My data was collected predominantly in situated

interviews and participant observations (the exception being Russell sending me screencasts of his planning). In the interviews and participant observations, I collected photographs of teachers' planning artifacts (plan books on paper and/or online), what teachers made for students (handouts, essay prompts, etc.), and artifacts of individual planning (screencast think alouds, video etc.). In Table 3.2 and the section below, I detail my data collection by participant.

| Data Sources | Data Collection Methods | Participants / Frequency / Quantity | | | | | | | | Description |
|---|---|---|---|---|---|---|---|---|---|---|
| | | Kirra | Sahra | Cora | Amelia | Eliette | Russell | Jessica | Elle | |
| **Interviews (minutes: seconds)** | Audio Recordings<br><br>Transcriptions | August (66:15)<br><br>October (56:10) | August (41:30)<br><br>December (26:46) | September (85:21)<br><br>November (47:50) | August (46:32)<br><br>November (41:12) | September (49:30)<br><br>November (48:35) | August (69:48)<br>September (51:28)<br>November (55:07) | August (21:38) | | I met with each teacher to hear them describe their planning practices. |
| **Planning Artifacts** | Photographs<br><br>Video Recording | Photographs of math curriculum book | / | Photographs of planning documents | Photographs of plan book<br>Video recording of 'tour' through plan book | / | Screenshots of screencasts | Copies of Understanding by Design template at beginning and end of sessions | | I collected pictures of what teachers described (and had on hand) in the course of their descriptions. |
| **Teaching Artifacts** | Photographs<br>Digital Copies<br>Screenshots | Photographs of math materials tub | Photograph of science chart | Math document | Pictures of student posters | Digital folders in Google Drive | Screenshots of website and daily blog | Metacognitive rubric<br>Think Aloud Passage<br>Worksheet<br>Student bookmarks | | I collected written products produced by the teachers to understand what they make for students. |
| **Screencasts** | Screencasts shared in Google Drive | / | / | / | / | / | 6 screencasts, shared via Google Drive (35:07 total) | 4 screencasts of co-composing and navigating digital tools | | Screencasts enabled me to understand the multiple voices and texts that informed situated teacher planning |
| **Participant Observations** | Field Notes<br>Artifacts<br>Audio recordings<br>Screencasts | / | / | / | / | / | / | 4 total observations totaling 3hr | | I collected audio and field jottings to understand the practices, texts, routines, etc. that teachers drew upon while planning. |

**Table 3.2: Overview of Data Sources Collected in Fall 2016**

In the following sections, I detail three trajectories of data collection that complemented each other in relation to my questions. Using different sets of data for different people enabled me to talk with teachers about their practice as well as engage with situated examples of this practice. In addition, these three trajectories of data collection assisted my ability to maintain relationships with eight teachers over the course of their fall semester, providing a rich data set while sampling in to varied contexts.

**Teachers across grade levels and content areas.** I interviewed five teachers twice in the fall semester. These teachers were Kirra, Sahra, Cora, Amelia, and Eliette (see Chapters 4 and 5). Interviews ranged from approximately 30 minutes to an hour and a half (see Table 2 for specific time stamps). By using semi-structured interviews (Merriam, 2009), that invited what teachers were thinking about and doing at that point in the year. In each interview, our conversation led to tools/texts embedded in their current practice.

***Interviews*.** I asked teachers what they were planning for at that point in the year. If they mentioned artifacts of their planning (i.e. "I use a plan book") I asked to see it. In our first interview, I asked them to describe their planning generally, as well as how they were planning to start the year, enabling me to learn about their stances at the beginning of a school year. For the second interview, I was interested in how the teachers were planning as they better knew the ongoing context of their classes and built on the knowledge of their specific students. I also conducted one interview for each participant at the end of the school year (excepting Sahra) regarding their chapter for their feedback and insights. During interviews, I took handwritten notes of our conversation in my research notebook. These interviews provided reflective and wide-ranging descriptions of practices where teachers drew into relation their past experiences and future intentions. As the teachers articulated their planning practices, I was able to ask

questions for clarification and elaboration. This enabled me to learn more about how they were framing their planning and how it was being instantiated into texts and talk.

***Artifacts.*** The artifacts that teachers talked about and showed me in our interviews included plan books, Google Drive folders, and curricular documents. I took photographs of them and made digital copies of documents in Google Drive.

**An ESL teacher and instructional coach**. I conducted regular observations of an ESL teacher and instructional coach as they planned for a unit in the ESL teacher's classroom. five meetings happened over the fall semester, each of them scheduled at the end of the previous one. When deliberating on when to next meet, Jessica and Elle took into account my schedule. In this way, I was able to closely attend to the natural conditions of collaboration in action

***Interviews***. I conducted one introductory interview at the beginning of the year to contextualize Jessica and Elle's planning practices and influences. This was especially important because Jessica was beginning her role as an Instructional Coach.

***Observations of planning meetings***. Planning meetings with Jessica and Elle provided a naturally occurring setting to observe planning dynamics, during which I recorded audio and captured screencasts (see Figure 3.1). The fall semester of data collection consisted of four of these observations. During these times, I looked for micro-genetic work of planning-in-action, including how planning sessions unfolded, what teachers brought into the conversations, other places and people they invoked, and how they oriented towards multiple chronotopes. Observing planning-in-action provided a data set that foregrounded the situated practices that teachers engaged with as they planned (in complement to the interviews where teachers talked reflectively *about* what they did). I took jottings that I captured on my screencast and also kept a

copy in Google Drive. These jottings captured some key phrases of what the teachers said, but also postures, gestures, facial expressions.

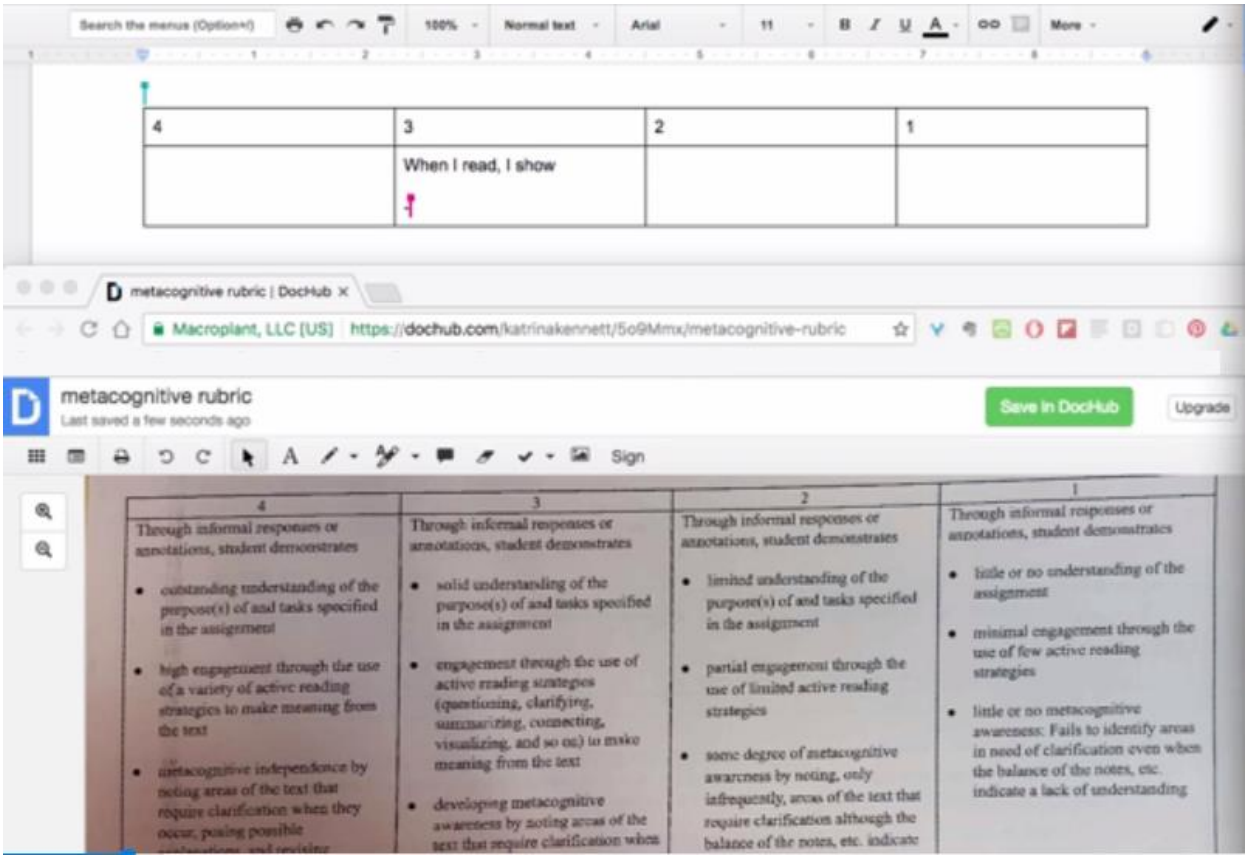



**Figure 3.1: Screenshot of data collection during participant observation**

***Artifacts.*** I digitized the artifacts that Jessica and Elle used in their planning meeting - e.g., Google Drive document, Google Drive folders, curricular documents – by recording screencasts and making digital copies into my own Google Drive.

**One high school English teacher.** For the trajectory of data collection for Russell, a high school English teacher, I collected interviews and situated artifacts (screencasts). In the interviews, Russell shared his perspective on his teaching context and articulated his reflections and intentions. The screencasts provided one instantiation of his planning as it happened in real-

time. As a hybrid of the other two data trajectories, I was able to use Russell's data as a way to consider what each data type was offering me in my analysis.

***Interviews***: I conducted two interviews with Russell regarding overall planning practices, recent and past professional development that shapes his understanding of project based learning (PBL), and his current framing of project based learning and thinking about the year ahead. One of these interviews happened at a café, one in his classroom and then at a café over lunch.

***Screencasts.*** Russell sent me eight screencasts on four different occasions. These screencasts totaled 55 minutes and 7 seconds in length. During them, Russell narrated what he was doing in a think aloud protocol (Ericsson & Simon, 1993). Since the screencasts recorded Russell's on-screen activity, they offered a window into his digital tool use (composing in a Google Doc, navigating a website resource, etc.). With both his narrated thoughts and his on-screen activity, I was able to consider how both informed each other in the evolution of his planning.

**Classroom environments.** Some, but not all, of my interviews took place in the respective teacher's classroom. One of my interviews with Kirra, Amelia, two interviews with Sahra, one interview with Russell took place in their respective classrooms. Aligned with the content of the interview I took pictures of posters on the wall, arrangement of desks, and student work the teachers showed me. I interviewed Cora at the library and at a coffee shop, both times she brought her computer and artifacts to show me. For both of my interviews with Eliette, I interviewed her at the local library. For Jessica and Elle's observations, I sat with them in Jessica's office, or we sat at a communal table in the middle of the Student Support offices.

## Data Analysis and Synthesis

I began data analysis as soon as I began collecting data and continued analysis throughout data collection. As part of the analytic process, I kept memos that recorded my evolving thinking about the data. As I examined all observational field notes, interview transcripts, and artifacts, I coded them according to both my conceptual framework and emerging themes (Miles, Huberman, Saldaña, 2014). In this section, I detail my analysis as an iterative cycle that kept the primary data close to me as well as allowed me to step away from it and think across the data sets.

### Immediate Work with Primary Data

A primary way that I kept close to my data was listening to my audio data repeatedly. I did so while taking walks or while doing chores. I continued this practice through the months of data collection, listening to each interview and participant observation, in full, multiple times. While I listened, I used a small notebook to jot notes, including time stamps, key phrases, or ideas (I demarcated any analytical jottings with brackets). After data collection or after listening to data, I also wrote memos or recorded verbal memos. These multiple passes at the data, intentionally done over time, kept the richness of my participants' narratives close as I continued through data analysis and writing.

### Secondary Work with Data

I analyzed my data using physical resources and digital platforms. Taking the pages of jottings, I ripped them out of their notebook and pasted them into my research notebook (see Figure 3.2). I then used a different color writing utensil and coded them for themes and questions. When I did so, I often wrote a second researcher memo at the bottom of the respective page.

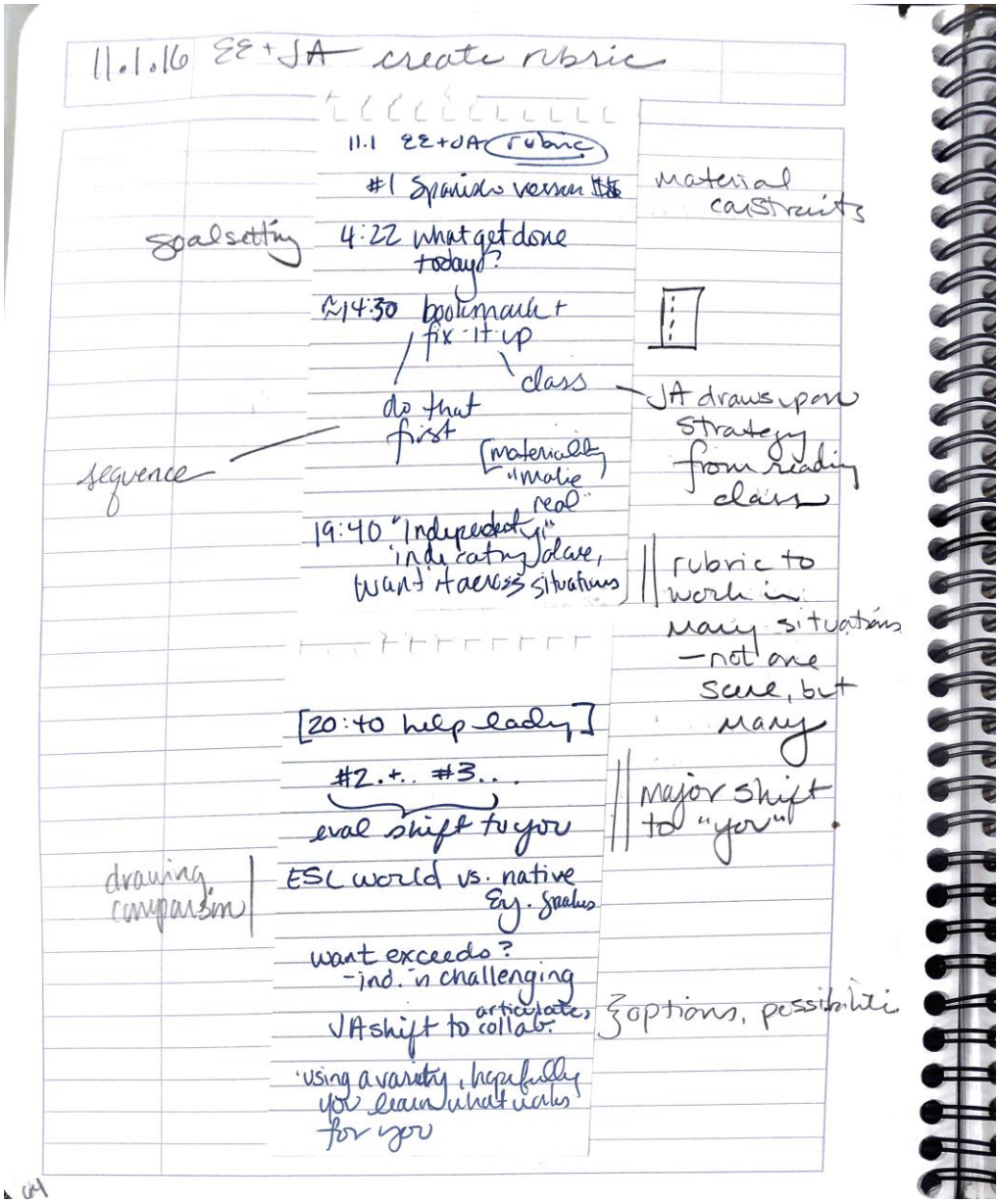



**Figure 3.2: Analytical process within research notebook**

For another pass at data analysis, I also leveraged a digital platform, Dedoose, to help me code and re-see the data across the cases. By coding the transcripts using Dedoose, I was able to then look at the information of one code. I was also able to trace my code tree changing over time. In a physical version of this work, part of my process was to print out the data in hard copy (and bind it). I then highlighted key sections and annotated according to my conceptual frames.

My understandings became increasingly complex over the course of this study and, when it felt as if I were being pulled in too many directions, I re-grounded myself in my conceptual frame. Informed by Hutchins (1995) and Wertsch (1991), I looked at the activity of individuals-acting-with-mediational-means but avoid pre-imposing unhelpful analytic boundaries (e.g., school/not-school), and reminded myself to "follow the actor" (Latour, 2005). These methods enabled me to develop working language about what I was seeing in and across the data and return to my research questions. Doing this repeatedly over data collection enabled me to see existing data with fresh eyes.

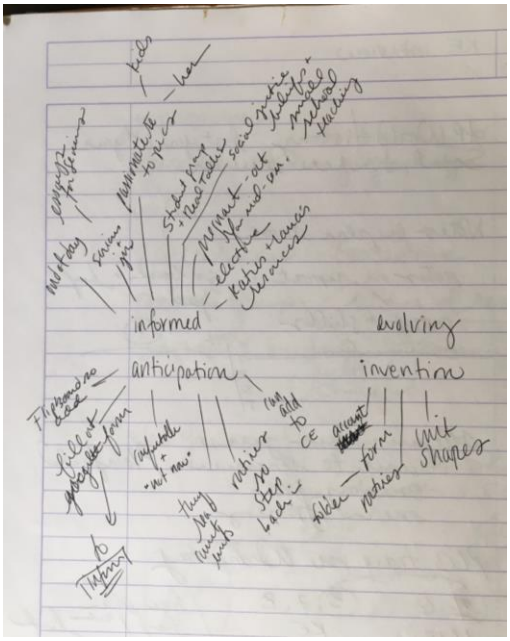
**Process as Analysis**

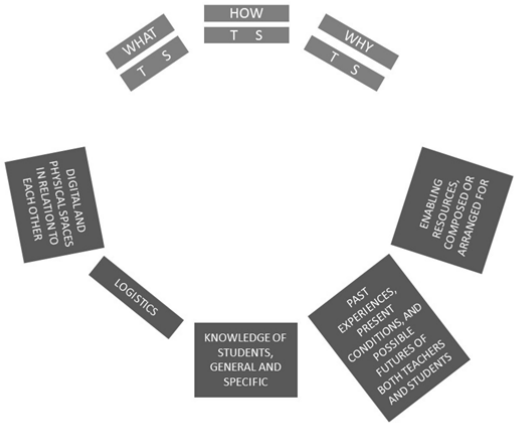
I often represented my analytical thinking in diagrams that I would sketch out on paper or on a whiteboard. Thinking symbolically (Saldaña, 2014), these diagrams became a mediational means for me to re-look at the data and talk to others about what I thought I was seeing. The first of these was a progression of non-linear representations and the second of these was an evolving table of themes according to participant.

**Nonlinear representations.** Through my data analysis, I drew non-linear polygonal shapes to diagram the dynamic and interrelated features of planning. This practice of representing relationships allowed me to better see the connections between moments with my participants and broader practices (West, 2011). My initial versions were informed by my pilot study and its attempts to characterize the activity of planning (see Table 3.3). As my work with data evolved, so did the diagram's language, becoming broader (see box for 4.26.17 diagram and "what" "how" "why"). For a long time, I struggled with how to represent the ways that teachers were planning both for themselves and for students (in box for 4.26.17 diagram, see boxes with T and S in them). As the diagram simplified, it moved to verbs that described practices within and

across the data sets. In fine-tuning the diagram to its current instantiation, I used Powerpoint to document increasingly minor language changes (see box for 6.28.17 diagram). These representations evolved in significant part because of ongoing conversations I had with various people. Among them were members of my committee, peers in my graduate program, teacher friends, former colleagues, and others.

**Table 3.3: Evolution of my thinking symbolically**

<table>
<tr>
<td> 

9.16.16 Sketching in notebook</td>
<td> 

4.26.17 Diagram for AERA Graduate Student Seminar</td>
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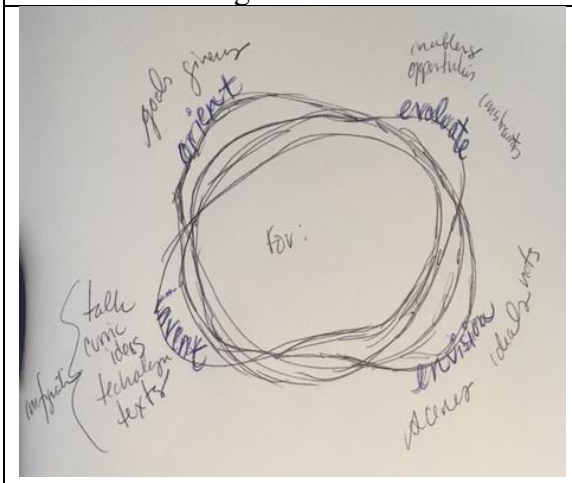
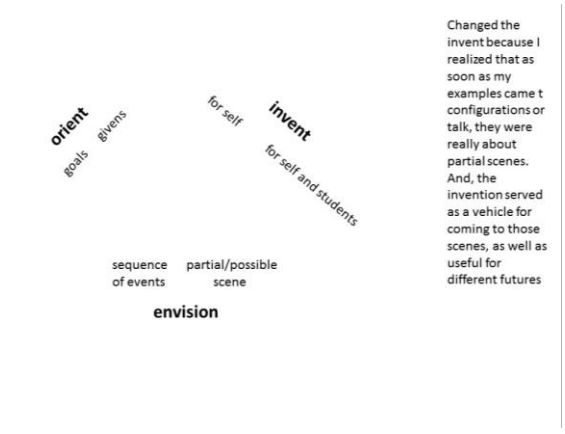
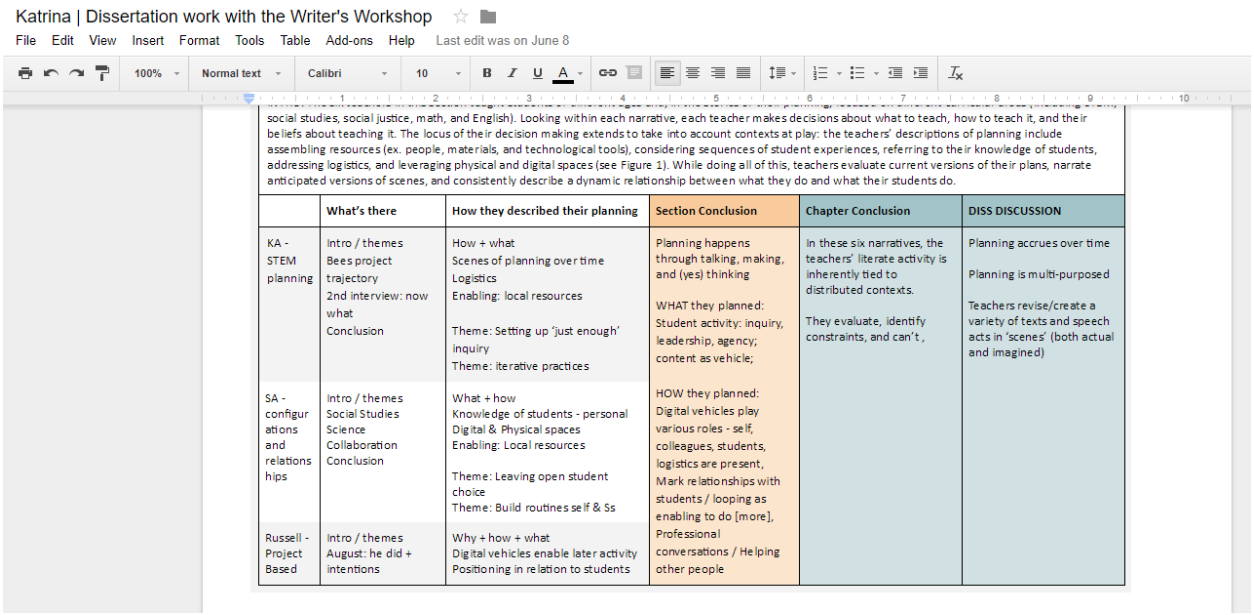
<td> 

6.9.17 Notebook sketching</td>
<td> 

6.28.17 Powerpoint with commentary</td>
</tr>
</table>

**Architecture representations.** One analytical practice I routinely turn to is having a shorthand representation of a longer piece of writing. During my writing of my findings chapters, I created a Google Doc with a table in it (see Figure3. 3). As I met with the Writer's Workshop, I would use the beginning of the meeting to talk about the evolving table and how I was organizing the longer piece we were about to dive into. Explaining this to them, and other audiences as time evolved, enabled me to articulate what themes each participant was highlighting in the larger work. I used this table outside of my work with the Writer's Workshop, printing it out and annotating it for my own use as I was writing. This was a helpful method for considering participants' stories in relation to each other and the patterns that I was building as I was presenting the data.


Katrina | Dissertation work with the Writer's Workshop

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social studies, social justice, math, and English). Looking within each narrative, each teacher makes decisions about what to teach, how to teach it, and their beliefs about teaching it. The locus of their decision making extends to take into account contexts at play: the teachers' descriptions of planning include assembling resources (ex. people, materials, and technological tools), considering sequences of student experiences, referring to their knowledge of students, addressing logistics, and leveraging physical and digital spaces (see Figure 1). While doing all of this, teachers evaluate current versions of their plans, narrate anticipated versions of scenes, and consistently describe a dynamic relationship between what they do and what their students do.

| | What's there | How they described their planning | Section Conclusion | Chapter Conclusion | DISS DISCUSSION |
|---|---|---|---|---|---|
| KA - STEM planning | Intro / themes<br>Bees project trajectory<br>2nd interview: now what<br>Conclusion | How + what<br>Scenes of planning over time<br>Logistics<br>Enabling: local resources<br><br>Theme: Setting up 'just enough' inquiry<br>Theme: iterative practices | Planning happens through talking, making, and (yes) thinking<br><br>WHAT they planned:<br>Student activity: inquiry, leadership, agency; content as vehicle;<br><br>HOW they planned:<br>Digital vehicles play various roles - self, colleagues, students, logistics are present, Mark relationships with students / looping as enabling to do [more], Professional conversations / Helping other people | In these six narratives, the teachers' literate activity is inherently tied to distributed contexts.<br><br>They evaluate, identify constraints, and can't , | Planning accrues over time<br><br>Planning is multi-purposed<br><br>Teachers revise/create a variety of texts and speech acts in 'scenes' (both actual and imagined) |
| SA - configurations and relationships | Intro / themes<br>Social Studies<br>Science<br>Collaboration<br>Conclusion | What + how<br>Knowledge of students - personal<br>Digital & Physical spaces<br>Enabling: Local resources<br><br>Theme: Leaving open student choice<br>Theme: Build routines self & Ss | | | |
| Russell - Project Based | Intro / themes<br>August: he did + intentions | Why + how + what<br>Digital vehicles enable later activity<br>Positioning in relation to students | | | |

**Figure 3.3: Architectural representation during analytical process**

**Longer form textual representations.** My analysis was additionally motivated and mediated by professional writing and speaking that I did during the course of collecting data and analyzing it for this study. This included a proposal for AERA, a proposal for LRA, a Center for Writing Studies presentation in the fall, the College of Education Graduate Student Colloquium,

the CWS Graduate Student Symposium, and the AERA Graduate Student Seminar. In addition to these more formal situations, I leveraged ongoing appointments at the Writers Workshop, meetings with my writing group, and conversations with peers and colleagues. These distributed opportunities to write with others, prepare data for analysis, and field questions were instrumental in helping me work through my ideas.

Composing what would eventually become my chapters was a long-term process of looking at patterns as well as using my conceptual frame to think with and beyond them. One primary consideration in representing my data was how to capture the laminated literate activity of teachers as they talked and worked with texts. This was especially pertinent in the participant observations of Jessica and Elle as they co-composed multiple textual artifacts in Google Docs while sitting in the same room. Another recurring feature within this data is teachers voicing themselves, students, and other people. This practice posed a representational issue – how did I capture the distributed nature of these voices within the situated data collection event? I chose to represent the participant speaking to me (or during data collection) as a centered block quote. An example from Kirra's interview in August models this choice:

> Well, we don't live in Wisconsin. We do have a dairy barn at Midwest University. We do have Farm of the Woods Creamery. It's goat cheese; it's not cow milk, right. But it's still milk, and it's still processing. So maybe…

I chose to represent when teachers voiced other people as formatted to the right margin, and when they voiced themselves to the left margin. Again, here is an excerpt from Kirra's interview in August, where she described another teacher speaking and then her response to that teacher:

> "Clark Orchard does a really great job on pollinators, with bees."
>
> And I'm like,

> "You're saying that because I took you on the field trip when your kid was in my room! But I'm glad you remember! Because I didn't remember that!"

I intended these formatting choices to mimic a dialogic sense of speakers going back-and-forth, and visually represent the practice of voicing another person within an account. At times (like in Kirra's example here), this voicing was of a past event. Other times, the voicing was of a future scenario. Here is an excerpt of Kirra speaking of something that she would like to say to her colleague:

> We'll look at some inquiry groups based on their 'wonder' questions, how we can pull in some books and some resources… I would love to say [to the other teacher],
>
> "Let's set up a time when we could pull a group, even if it was during your reading group time. Could I send you a group of kids and you guys could read a book together, or you send me a group of kids? Or, we could pull up a video on YouTube and let them plug in with headphones and watch, and then them do a response page to that, as an independent inquiry group, where they could report back to the class on that."

In representing the words of my participants, I was sensitive to their use of 'fillers' (i.e. "like," "you know"). In their respective reviews of the chapters, multiple participants asked me to represent the transcript without so many of these fillers, and I removed them from the transcripts as was needed to maintain clarity and intention (Bloome et al., 2008).

In addition to representing speech, I also represented select instances of teachers composing a text while speaking aloud. One of the examples of this was for Russell's screencasts. During these, Russell would speak aloud while navigating and typing on his screen. When Russell spoke the same thing that he typed, I underlined it. If he did something meaningful

on the screen that he did not say aloud (ex. type a word), then I described what he did in brackets. Here is an excerpt of a description from one of Russell's screencasts that displays both of these conventions: as Russell remembered this idea, he typed "Museum Gallery (QR Codes)" and said, "I really like that idea. I think [types "->" and types/says "let's go with this"] I really like it as an opportunity get different people in the school community as part of the conversation and create multiple perspectives as to what's going on." Through these means, I sought to represent to the reader the interplay of Russell's speech and textual creation.

My conceptual frame helped me think across and beyond patterns to create and refine a three-part working model of teacher planning (see Chapter 6 for full explanation). In short, my model consists of three core planning practices: orienting, inventing, and envisioning. I was better able to articulate these practices because of the holistic perspective provided by combining literate activity, mediated agency, and distributed cognition through a variety of analytical strategies (Maxwell, 2013). Specifically, literate activity helped me look at the texts, language, and trajectories of planning over time, tracing them by attending closely to how teachers described their work as actors. In addition, considering laminated chronotopes helped me engage deeply with the scenes – past and future - that teachers leveraged in the course of their planning, offering a useful tool to develop the ideas of orienting and envisioning in relation to one another. This lens was also integral to think about the ways in which teachers were planning for themselves and times they were planning for themselves-and-students (and how to consider the many overlaps those categories provide). With the lens of mediated agency, I was better able to look at the toolkits that teachers drew upon in the course of planning, and attend especially to the multiple tools they leveraged while they invented for instruction. It also helped me consider how voices were a tool they employed to evaluate working plans. To that end, distributed cognition

helped me get out of teachers' heads and see the contexts within which they were a part. This perspective of invention as a social activity, while featured in all three lenses, was especially useful when looking at the social events within which teachers planned. Overall, my process of keeping the conceptual framework close, maintaining rich connections with the data, and using a variety of mediational representations resulted in the theory I built.

**Outlines of the Chapters**

This study looks to contribute to the current understandings of teacher practice through constructing a theoretical framework and methodology that considers teachers' planning more broadly than previous research. Looking across a range of situated sites of planning, I collected narratives of experience that informed a conceptual theory of teacher planning, a model that invites more complexity than previous ones. Here, I outline the upcoming chapters.

Chapter 4 and 5, written concurrently but separated to foreground two main findings, provide insights as to how planning is a highly social and distributed process and how it is a practice responsive to its local context. Each chapter features three teacher participants. Their respective sections are organized into two sub-sections, one from the early Fall interview I conducted and one from the late Fall interview. Each participant's sub-section explores a theme that is found *across* the teacher narratives, a result of my constant analysis that looked across participant cases. More specifically, Chapter 4 considers the social and distributed nature of planning, including how it is distributed over time, places, and texts. Chapter 5 presents multiple ways that planning is responsive, including to students, to context, and to teachers. Underlying these six cases is the role planning plays as a personally meaningful, creative, and contextual practice.

In Chapter 6, I present a working model of teacher planning. A three-part model, it was built from analysis of all of my data sets, though the chapter features two situated narratives. The three parts – orienting, inventing, and envisioning – provide three entry points into the dynamics of teacher planning. Breaking these dynamics down one step further, I present two situated narratives to explore how teachers, based on goals and givens, compose texts and talk for intended use in future instructional contexts. Overall, I argue that developing this lens and language to describe teacher activity encourages us to re-see this core practice from the perspectives of those who engage in it every day.

Finally, Chapter 7 summarizes the findings from this study and argues for widespread attention to teacher planning practices. I discuss ways to support both pre-service teachers and in-service teachers, my next research steps, and areas of opportunity for Education and Writing Studies scholars to consider.

# CHAPTER 4

# PLANNING: A SOCIAL AND DISTRIBUTED PRACTICE

In this chapter, I present narratives of three experienced teachers who describe their planning practices for grade-level curricula. These teachers are Kirra, who taught kindergarten; Sahra, who taught 4th and 5th grade ESL; and Russell, who taught high school English Language Arts. Drawn exclusively from interview data, including artifacts that these teachers shared in our conversation, I traced how these teachers discussed histories of planning as they shaped possible futures. Because they were thinking reflectively about their practice and explaining to me why they do the things they do, their insights consistently connected their past experiences with their current contexts. Within and across these cases, I articulate this main finding: planning is a highly social and distributed practice.

These three educators described planning as a process that built from conversations, included co-creating texts, and involved assembling human and material resources. Kirra detailed a collaborative, year-long trajectory of planning for an inquiry-based project that fulfilled science, math, engineering and mathematics (STEM) standards for her kindergarteners. Sahra articulated how knowing students from the year before enabled different work with them, and how ongoing professional collaborations served multiple purposes over time. Russell explained how building and maintaining a classroom website provided a vehicle to help students develop ownership over their work. Each of these teachers drew upon their past experiences as they invented for and envisioned possible classroom futures. In their narratives, these teachers foregrounded the social and distributed nature of planning.

## Kirra: Developing Curricular Ideas over Time

Kirra was an experienced early childhood and kindergarten teacher in her 4th year at her

current school. She worked closely with the other kindergarten teacher, who was a close friend of hers, and often worked with colleagues to develop curriculum for her students. In this section, I trace how Kirra's long-term planning process was informed by conversations with other people, built on her own past experiences, and involved assembling resources and situations that enabled student inquiry.

Planning curriculum results from an accumulation of many experiences, and Kirra described her planning for STEM activities happening over long periods of time. She told me, "I get an idea of something… I mill it around for six months, or seven or eight months." The evolution of project planning was punctuated by social situations that acted as catalysts for her planning. For example, one STEM project started at a science planning meeting, "then it popped up again when I needed to have something for SPED class." As she accumulated the materials her students would need for the project, Kirra added that playing with them herself was an essential part of the process, "I kind of have to run through some of that before, otherwise it's going to fail for them." Distributed across time, situations, and materials, Kirra's planning for STEM instruction demonstrates the ongoing intellectual and material work of planning.

**Assembling resources for student experiences.** I talked with Kirra in August, before the school year started. She told me about how, with the rollout of new STEM standards, the instructional coaches in her district set up professional development meetings for elementary teachers. At these meetings, Kirra said that the teachers discussed the new standards, looked at potential project materials housed in plastic tubs, and worked with graphic organizers that they could then use in their own classrooms. One of the graphic organizers they made "started with 'I wonder,' so that you could work through an inquiry project with students based on just a wonder-question or two." Kirra's positioning as a learner in her professional setting offered

multiple experiences that she drew upon in the course of her planning.

During this planning meeting, Kirra described how the group brainstormed for a “farm to table” project. The first idea was to follow milk from what cows eat, “all the way until having a glass in front of you.” In light of this initial idea, Kirra evaluated her local context to consider how its features might (and might not) enable the project to happen:

> Well, we don't live in Wisconsin. We do have a dairy barn at Midwest University. We do have Farm of the Woods Creamery. It's goat cheese; it's not cow milk, right. But it's still milk, and it's still processing. So maybe…

Kirra’s weighing of resources – both what was *not* available (not living in a state known for producing cheese), and also what *was* available (having access to multiple cheese processing ventures) encouraged her to keep exploring the idea.

The collaborative nature of the planning session enabled Kirra to develop her ideas in relation to local resources and her own past experiences. She recounted how the dialogic brainstorming session served to more fully develop the idea of her STEM project. In the conversation, another teacher offered an idea and Kirra voiced herself, in the situation, responding to that idea. This was after the topic shifted from milk to honey, and another teacher commented:

> "Clark Orchard does a really great job on pollinators, with bees."

And I'm like,

> "You're saying that because I took you on the field trip when your kid was in my room! But I'm glad you remember! Because I didn't remember that!”

Enabled by specific configuration of people, Kirra was reminded of something she had previously done as a teacher, an example of distributed cognition (Hutchins, 1995). The mental

work accomplished (retrieving this helpful information) was a result of the context (the other teacher providing it), as opposed to cognition being located solely in Kirra's head. Remembering prompted Kirra to think of a string of other possible resources available to her – a local science center and members of the school community – that she might assemble:

> You know, I'm thinking, the Pollen Museum; I'm thinking, we've got an art teacher who's a beekeeper; we've got a parent who's a beekeeper. Beeswax -- you know, maybe we can follow bees and honey, and talk about wax, and then someone else is like,
>
> "Well what about wax to crayons?"
>
> And I'm like,
>
> "Oh, that's really good -- what about tree-to-paper, wax-to-crayons as mini-projects for kindergarteners?"

Kirra's brainstorm, proposing multiple opportunities for student experiences with special guests and local resources, elicited a response from another teacher that helped her refine the working project idea. The unfolding nature of the project idea was a result of Kirra's thought process *in actual conversation with* the other teachers. The evolution of this STEM project idea, from broadly 'farm-to-table' to a more specific 'wax-to-crayons,' drew together multiple timescales, local resources, and relationships. Ultimately, this collaborative brainstorming was the catalyst for her curricular ideation.

With a few possible converging leads, Kirra assessed the logistics at play. To go to the orchard, Kirra and the other kindergarten teacher needed money. With one of the instructional coaches and the other kindergarten teacher, she started looking at a local teacher grant to fund the field trip. Kirra said she initiated pre-writing in a collaborative Google Doc and invited the other two educators. The grant language spurred questions among the three about how they

would go about accomplishing their intentions. Kirra evaluated what Clark Orchard had to offer in light of what type of field trip it would enable for student experiences (and a bit of sarcasm for what wouldn't work):

> They do a nice job of doing that, and having it controlled. Sure, I'd like to take 60 kindergarteners out, you know, just on a lawn somewhere and look at bees. But I'm thinking that maybe that's not a good plan. A little more structure would be nice.

Starting with what she knew about Clark Orchard, and then envisioning a scene she did *not* want to happen, helped Kirra evaluate why Clark Orchard would be a good choice in relation to her situation. In deciding upon a location, Kirra described the goal of having that many students learn about science topics, asking: "where is a place that's set up to allow us some information about what we want for the science topics, or the STEM topics?" Through this part of the planning trajectory, Kirra took into account what was available to her and then returned to the goals she intended to fulfill as she assembled resources and opportunities for student learning.

The planning for the rest of this project continued to be collaborative and iterative over time. After this initial planning session, Kirra, the other kindergarten teacher, and the instructional coach met to plan what activities could lead up to the orchard field trip. Kirra suggested re-using an activity that she used in a summer camp a few years previously. This activity, which entailed volcanoes (paper cups) that needed to be stopped from erupting (placing packing pellets into the cups). The instructional coach liked the core problem-solving aspect of the activity, but said that the premise of a volcano wasn't quite right for their current topic. At the end of the meeting, she said she would keep thinking about how to change it. Reconvening for another planning session, the instructional coach brought a revised version of the activity: she changed the premise to be about bees: that all of the bees had disappeared and the flowers (paper cups) weren't getting pollinated (with cotton balls), so humans wouldn't have any food. Kirra

became excited and said, “all [she] did was take the cups that I was going to pretend were the volcanoes, and add construction paper petals on them, like flowers.” The activity maintained the core problem-solving dynamic, but the story and the materials were the only things altered. Kirra was excited about this material change – the now-petaled container enabled the activity to dove-tail with her ongoing bees-to-honey STEM project. As a revision of the old camp project, a result of collaboration, and an iteration of Kirra’s past, this new activity served to ‘fit’ in the local context and demonstrated the evolving nature of collaborative planning.

As planning played out over multiple time scales, it also crossed a number of instructional and non-instructional contexts. Another idea for the pollination activity came to Kirra when she was relaxing with her family:

> So I'm at the pool this summer, and my kids order a snow cone. I'm looking at the snow cone containers, and I go,
>
> "Oh my gosh, that looks like a flower planter! There's the flowers to deliver the pellets -- the cotton balls -- deliver the pollen pellets to the flowers! Oh my gosh!"
>
> You know, you can't get it out of your head. It's always there in the background while you're trying to do something else, like sit at the pool and have a snack with your kids.

In this non-instructional context, the physical object (the snow cone container) reminded Kirra of what the teachers had been trying to create and re-envisioned it into their intended context. Kirra’s conversations with others, her past experiences with the volcano activity *and* the instructional meeting, and the materiality of the snow cone container, enabled her to assemble the snow cone container into a future scene with students. Planning, not bounded to school contexts and school times, was instead “always there in the background while you’re trying to do

something else."

Developing curricular ideas was the result of social situations where educators assembled and re-envisioned material resources in relation to imagined futures. Materially, planning involved re-seeing the container students would use conceptually (from volcano to flower) and materially (plastic cup, then with paper petals, to plastic snow cone container). This container mediated the idea of how students would work with the STEM activity. Cognition was distributed across social situations (planning meetings, family time relaxing at the pool) and texts (graphic organizers, local grant application). Motivated and mediated by texts and speech, planning situations drew together the experiences and imaginations of *multiple* educators, not just the focal teacher. Unfolding as a sequence, developing curricular ideas depended on situations that happen within and outside of school-bounded 'planning time.'

**Working with others to support students.** Collaborating with colleagues was a consistent part of Kirra's planning process that enabled her to offer students opportunities for inquiry. Between our first and second interview, Kirra and her colleague had won the local teacher grant and used it to go on a field trip to Clark Orchard. When I talked with Kirra in October, she and the other teacher were working on extending the experience of the field trip for their STEM instructional time in each of their classrooms.

Using an "I wonder" activity they had done with the instructional coaches when planning for STEM inquiry (which speaks to the distributed and iterative nature of planning), the teachers had recently asked their students what their post-field trip "I wonder" questions. The other kindergarten teacher hadn't recorded her students' questions when they shared them, so was planning to document them soon. After she did so, Kirra described, in a series of possible scenes, how then the two teachers might configure shared inquiry groups and what those groups would

enable students to do:

> We'll look at some inquiry groups based on their 'wonder' questions, how we can pull in some books and some resources… I would love to say [to the other teacher],
>
> "Let's set up a time when we could pull a group, even if it was during your reading group time. Could I send you a group of kids and you guys could read a book together, or you send me a group of kids? Or, we could pull up a video on YouTube and let them plug in with headphones and watch, and then them do a response page to that, as an independent inquiry group, where they could report back to the class on that."

Based on the students' activity – their 'wonder' questions – Kirra envisioned a planning conversation with her colleague. Their conversation would inform how they might configure students to best support various modes of inquiry. In playing out possible scenes ("could I send you…", "or you send me…", "or, we could…."), Kirra envisioned possible opportunities for students to work with digital and physical resources, in small groups and in whole group configurations. This example of Kirra's planning shows how planning for student activity can depend on other people and is not just a series of decisions made in a teachers' head.

In general, Kirra's STEM planning was a responsive and unfinished process, with teachers' activity and students' activity anticipated in relation to each other. Expanding on her intentions that this project would be inquiry-based, Kirra first outlined her intentions for student activity and then marked her own activity, identifying tensions between providing structure and being responsive:

> We're trying to do it as an inquiry-based project. We're trying to let it be student-led, but also have this structure that we know, if they don't get to it, we're going to inject it anyway. But that is still up in the air.

She added:

> You want to map some of the ideas out. You want to make sure you have some resources available to draw from, but you don't want to over-plan it or over-think about it. And you want to be flexible enough to just go where a kid wants to go.

Here, Kirra framed the tentative nature of planning *in complement with* structure, knowledge, and resources that she brings to bear. The teachers' roles--to inject structure, provide resources, and be flexible--are defined in response to what students do. Planning, as a highly social and distributed process, inherently involves the activity of students in their shared context.

As Kirra expanded on what student-led meant, she gave an example of how the unfinished nature of planning played out on an individual student level. Kirra provided a specific story about how the inquiry-based intentions had been informed by the activity of her kindergarteners:

> There's a kid obsessed with blue bees right now. I didn't even know there were blue bees. He's interested in them. He learned something about them, related to our field trip. He went home to research something, and then is drawing pictures. So there's this whole bee thing that I think will just carry throughout the year. Hopefully we'll just carry it until it -- you know. Until it dies off like the old queen bee.

Kirra's example of the student's interest in blue bees highlights how she opens up opportunities for student inquiry. She does this by keeping flexible the multiple time scales of planning and by building on students' prior experience. Kirra designed instruction to provide students experiences they could draw upon, at the same time intentionally leaving open curricular choices to later be responsive to students.

Developing curriculum is a highly social practice affected by multiple features of contemporary contexts. Motivated in part by state adoption of new STEM standards, Kirra

worked with others in workshops offered by instructional coaches to develop possible STEM instruction. In closer collaboration with the other kindergarten teacher, Kirra considered (and leveraged) the local resources of the teacher grant to provide a field trip experience for the kindergarteners in her and her colleagues' classes. In addition to working with adults, Kirra's planning also depended on the activity of her students; it was their interests and inquiry that would shape the upcoming STEM opportunities she and her colleague would offer.

Distributed across contexts and conversations, Kirra's planning for STEM curriculum happened over time. Anticipating future events can take the form of articulating possible future 'scenes.' In Kirra's planning practices, she sometimes envisioned possible scenes (of what shared inquiry groups could look like), and sometimes scenes she didn't want to happen (the logistics of 60 kindergarteners in a field). By playing them out, she was better able to evaluate the possible futures they made available.

**Sahra: Designing with Knowledge Accrued Over Time**

Sahra was in her 11th year of teaching and taught 4th and 5th grade content-based English Language Learners. Since she taught consecutive grades, she 'looped' with the students who stayed in ESL as they moved up a grade level. Sahra's knowledge of her students shaped her planning for students.

Sahra's knowledge of her 5th graders, whom she taught the previous year as 4th graders, resulted in an assurance that "I know what my students can do." Her knowledge enabled her to say to herself, "So I'm like 'ok this is what we're going to do first, this is where we're going to head to,' because I know that they can handle it." Building on their past experiences together, Sahra was able to make instructional and curricular decisions right away in the school year. Not knowing her 4th graders in the same way inhibited this sort of early planning:

> My 4th grade group, on the other hand, who I'm not traveling with, that's more of like

"I need to find out about the kids first
before I make too many plans."

> Because you can make as many plans as you want, you can think

"I'm going to have four reading groups"

> you might have six, who knows. And you might have that one kid who doesn't fit in - what are you going to do with him? And that's got to be part of the plan.

Sahra's need to know her students changed the way she voiced her intentions for planning for them. Confident with her direction for her 5th graders, she noted how it wasn't useful to plan ahead if you didn't know your students, because change and flexibility must be part of how teachers anticipate future interactions with students. Knowing her 5th grade students improved Sahra's ability to plan for them, and she also had to plan to get to know her 4th grade students before she could support their needs as learners.

Throughout Sahra's descriptions of activities and interactions, she emphasized the role that knowledge of her students played in her planning. Sahra consistently described close relationships between what she was teaching and how she was teaching it. Sahra, like Kirra, articulated long trajectories of planning, both in her professional relationships and planning projects that would take a few months to be accomplished. Her reflections demonstrate the generative role of professional conversations, especially those that lasted over time.

**Configuring situations for self and students.** I sat down with Sahra in August, a few days before she started the school year. She told me about how her science instruction was heavily influenced by an ongoing collaboration with a science teacher at College Prep High School and a chemistry professor at Midwest University. She met them both in 2012 when she

participated in a professional development opportunity provided by the local university, an event that she described as "preparing teachers to pretty much be better science teachers. Because you don't get as much practice with that – you either love science or it's the scariest thing as a teacher." She said that the experience pushed her to incorporate more advanced science into her elementary school classroom. Sahra's own experiences as a learner, distributed across time, place, and relationships, affected how she planned for responsive science instruction.

The planning for these educators' collaboration relied on relationships and routinized communication. Sahra described collaborative planning with the teacher and professor as happening through in-person meetings during summers that built over multi-year scales:

> That's how that all got started and it just continues - we keep meeting once a summer to talk about potential plans… And some of it is repeats from year to year, but just like more like we're going to do this, what changes. We look at the calendar and look at the standards and look at how much time is potentially needed for each one.

The vehicles for planning here – relationships and routines – enabled Sahra, the science teacher, and the chemistry professor to plan for text, topics, and time their students have together. Sahra went on to say, "Then we just include each other [on email]. I just include them on what I'm doing next and give them enough time to come up with something to do with the students." Planning here was distributed over medium (conversations and email) as well as time (during the summer and then ongoing through the school year). In addition, this distributed planning relied on the educators' relationships with each other and their experiences working with each other repeatedly. To plan, they must configure situations for themselves to plan.

During the school year, collaborative planning was multilayered and multipurposed. Before the science teacher and his volunteer high school students came to Sahra's room, they met during the school's volunteer hour and went over the experiment with the chemistry

professor. This first pass at the experiment prepared the high school students to be in charge of small groups of Sahra's students when they came together. While the high school and elementary school students were engaged in the experiments, it gave the time and space for the educators to catch up and plan ahead. Sahra said,

> The professor, the chemistry teacher, and I are kind of in the background; we chat about what's been happening in my class and what's happening next. A lot of those talks happen through email, or when we're standing or sitting around and talking to each other. So the planning happens in a lot of different ways. And, it has to because we don't see each other very much.

Being together in the same space, the situated nature of classroom visits, afforded a synchronous opportunity to plan, complimented by the asynchronous nature of email. In these conversations, the educators were planning for Sahra's class, but also for another purpose: to determine what the science teacher and chemistry professor will do with the high schoolers before they came the subsequent time. In these ways, planning was collaborative and served multiple purposes for the three educators.

While leveraging email and in-person conversations to coordinate their time together, there were times that coordinating conversation fell through. When this happened, Sahra said she might know the topic, but not exactly what the science teachers and the high school students were going to do. Even when Sahra didn't know exactly what to expect during the science visit, she was confident in the other two educators. She said:

> They try to but don't always send me the plans for the experiments that they're going to do next. Sometimes they walk in and I don't know what they're going to do. I know it has to do with the topic of what we've been working on, but I don't know exactly what it is. And that's ok, they always do great things, so I'm not worried about them coming in with something ridiculous.

With only partial knowledge of the anticipated lesson, Sahra felt comfortable that the *situation*

was planned for, even if the content was unclear. Distributed across the success of their ongoing collaboration, Sahra was not the one actually planning for what her students do, but instead planning for the time and space for the other educators to work with them.

Having the plans in advance, however, enabled Sahra to better prepare students for the science visit. In explaining her perspective on this, Sahra narrated multiple voices – an imagined elementary school student, her imagined self-as-student, and her imagined student – as another way of articulating what seeing the plans would enable,

> It's good to see the plans in advance so I can prep some of my students, who are newer to English. I try to pre-teach the vocabulary, I give some visuals. So that they're not just like
>
> "What?"
>
> And just sit there. Because that's what I would do if it were in a language I didn't know, like
>
> "Cool… something just happened but I don't understand at all…"
>
> So if they [have] seen it before then they're more likely to be engaged the second time around, cuz it's not like they're not just focusing on trying to figure out what's going on.
>
> "OK I've seen this now I can really get into what's happening."

In describing what she would – and would not - want to happen, Sahra voiced a 'confused' student, herself in that student's shoes, and what kind of reaction she hopes her successful preparation would create. By aligning herself with a confused student, she articulated how the pre-teaching ideally prevents this type of confusion. Sahra, with more of a detailed plan than a topic, was able to do more with her students and construct experiences that built on each other.

In all, this is an excellent example of how access to particular textual forms, distributed across other people and time, enabled different situations for one teacher as she supported her students' learning.

The purposes and benefits of this science collaboration extended beyond the immediate classroom, as they played into planning opportunities for the future. The collaboration with College Prep had ways it might evolve, including moving physical spaces and visiting College Prep High School more often. While Sahra's class visited once a year as a field trip, they were planning ahead for the upcoming year to visit College Prep, "This year we'd like to do some of the experiments we're doing here at College Prep because they have actual chemistry lab tables, we can do more interesting [ones that are] not as safe for an elementary school table experiment." Sahra noted that College Prep students were increasingly writing about their volunteer time with her students in their college admission essays, and saying that they wanted to find a way for something similar in their studies or future jobs, "so that outreach is not just benefiting my students, it's benefiting the College Prep students." As another example of how their planning was instantiated, Sahra, the science teacher, and the chemistry professor were looking forward to presenting at the state Science Conference to talk about their collaboration.

In multiple configurations, in person and digitally, Sahra worked with the chemistry professor and the science teacher to invent situations for their students with materials that happened over time. Their planning (and what they planned for) was multi-purposed – they planned for situations that transcended one teacher thinking about one class. The teachers, together, planned for an integrated event that drew upon all of their expertise and experiences, accomplishing as a group what none of them could do alone. All three educators built on knowledge of students, people, *and* curricular content. Sahra's example demonstrates that

planning is highly social and distributed over time, people, and materials.

**Leveraging trajectories of texts, talk, and technologies.** When I talked to Sahra in December, she framed her upcoming Social Studies project as part of her ongoing practice with students: "We always teach my science and social studies within projects. That way they all have a goal, and they know that they're not just doing stuff to do it. It's easier. And this also helps me know my endpoint too, with them." As Sahra explained the upcoming social studies project to me, she took into account how she would arrange curricular expectations in light of how students would demonstrate their knowledge, how the project would play out over time, and how she would bring previous resources to bear using various technologies.

Part of many teachers' planning is translating standards into specific classroom contexts. Sahra fulfilled the 5th grade requirements of covering 150 years of history by dividing the expectation into decades. Of this decision, she said "[the students are] going to make a diorama of a decade, because fifth grade history is ridiculous. It's from the Civil War until now. It's like, 'Yea, let's just do 150 years.' Sahra made the research within the decade more specific, including possible curricular topics and intentions in relation to each other:

> And so, they each have a decade, and there's going to be like different points that they need to research, like the presidents, the wars that were happening, the conflicts, important people, technology that advanced us. And it's a US view with a look into the world. So bringing those connections back. It's not just supposed to be US history.

Planning involved constructing the features of the assignment--the 'givens' that would guide students' research activity by topics and intentions. She went on to describe the upcoming project as both a "low-tech and a higher-tech presentation." Sahra outlined the expectations of what students would create, foregrounding how they would assemble multiple elements into an overall project that featured both digital and physical artifacts:

> And so they'll all make a diorama from all the information, so it might be, we'll talk about what it's going to look like, and they'll have a report that they write that goes along with it, and sort of explains it. And then they're going to make a Prezi, and with the Prezi, we'll make a QR code with that, and on the back of the diorama, they're actually going to stick the QR code so then people -- and we'll have that out for people to look at. That way people can see both presentations -- or, projects that they did.

Sahra's planning involved building a trajectory of student activity in sequence. The sequence relied on their work ("they'll all make" … "they'll have a report" etc.), as well as what "we" would do ("talk about what it's going to look like," "make a QR code"), intertwining their anticipated activity. Students' composing was multimodal and involved nondigital and digital means of composing that iterated into different forms (diorama, presentation and Prezi, hallway artifact including QR code). In fulfilling curricular requirements, Sahra designed a project that marshalled available technologies, situations for composing, and opportunities for publishing, all of which she envisioned playing out based on student and teacher activity.

Teaching something more than once affords teachers past experiences to draw upon, conceptually and materially. Sahra said that two years ago, she had done this project and extended the audiences for it beyond the physical classroom walls. She said, "we actually put the QR codes outside, on the wall outside, across from me. And I put a little sign saying what people should do to see it." While she had explicitly created a text to facilitate passer-by's reading, she didn't anticipate having to do that this year because "now that we have kindergarteners with iPads, they can just go over and look at it [and] scan it." Planning for her students' project took into account the current context of the schools' technology-wielding kindergarteners, extending the audience and leveraging the space of the school hallways. In order for this to all come together, Sahra said she would teach her current students to create QR codes, saying "it's super easy. There's so many websites." This degree of comfort, stemming in part

from her own past experiences making QR codes by herself and with students, informed what she would do with her current students. Sahra also described how the project fulfilled multiple curricular objectives:

> And so they're going to look at listening, and reading, and writing, and speaking, and part of that, so all of those things come into play, because the presentation -- we're going to talk about the presentations and how they're actually going to present, and not just reading from a paper. And I'm going to show them a video of other students that I filmed two years ago, presenting.

Sahra again articulated students' work in relation to how she would enable it. Her narration of the project marked what 'they'll do,' what 'I'll do' and what 'we'll do.' Sahra leveraged her past experiences, technical knowledge, and knowledge of the present school context to bear as she invented opportunities for student activity to be distributed beyond her classroom.

Trajectories of planning also extended over the rhythms of the school year. In recounting a conversation with this year's students, Sahra explained the expectations for the project as happening both in-school and out-of-school. She explained:

> I told them [the project ends in] April. Because ACCESS and PARCC testing are all happening in the next semester, and so I want to give them enough time, and also the history -- expectations are for the end of the year, so I want to give them time to work on it, but I did tell them there's going to be some home part of this, like they can't do it all on school.

Preparing for a trajectory of student and teacher activity, Sahra recruited the structure of the project and the year. She drew upon artifacts she made in past years, and the affordances of the digital tools (and school-based access) that students would have available to them. Her envisioning traced along the structure of the school year (events like schoolwide testing), as well as oriented to core learning standards (listening, reading, writing, and speaking). As she anticipated this project, Sahra's narration demonstrates how often planning factors are

distributed and impacted by aspects beyond a teachers' isolated decision making.

While planning can trace along the time scale of a semester, project, or year, teachers like Sahra are usually engaging in long-range planning. For example, when students heard about the inquiry project, they asked if they could start right away. Sahra told them they could create a Google Doc and share it with her and start putting in information. She then explained her expectations for citing sources and said to them, "if you don't, I'm not going to let you use it." Voicing herself talking to her students, Sahra showed how she intended her lessons to play out well beyond their time together:

> "I'm telling you this now, because your high school teachers -- you won't remember me, you're going to think you knew this all by yourself. Your teacher's going to think you're awesome, but just remember, I'm the one that taught you that you cannot steal work.

As Sahra described her planning for social studies and science, her decisions about what to teach and how to teach it were dependent upon a trajectory of social situations, both past and anticipated. She deployed her knowledge (of students, of science, of the curriculum, and of technologies) to shape the architecture and expectations for students' experiences. Sahra participated in science professional development, an ongoing connection to other educators who themselves acted as enabling resources for her students' science learning. Highly social and widely distributed across contexts, conversations, and technologies, Sahra's description of her planning over time demonstrates how planning is mediated by ongoing situations and texts-in-contexts, and motivated by relationships and curricular intentions. Similar to Kirra in multiple ways, including her ongoing creation of situations-with-materials for students and collaborative

professional relationships, Sahra's narrative directs attention to the flexibility teachers need as they plan with evolving features of a situation. These features, the 'givens' of the current context, played an important role in how the third teacher in this chapter, Russell, planned for his high school English classes.

**Russell: Working from (and with) the Givens at Play**

Russell was in his tenth year of teaching high school English and entering his second year at his current school. He described his current school and department as traditional, with assigned grade-level books, established curricular units, and common final exams (for units, the semester, and the year). When compiling final grades at the end of the previous school year, Russell noticed that he had fewer failing students than years past, but realized that "the vast majority of those students were students of color." Drawing upon his experiences with project based learning at two of his previous schools, Russell turned to project based learning to "give more agency to the students, and give them more autonomy and choice," saying, "I think it's a good tool to try to create better opportunities for all of my students, regardless of their situation."

In this section, I trace how Russell's goal to implement more project based learning was instantiated in his use of classroom websites. Russell explained, over the course of two interviews, how he could use websites (his and his students') to fulfill multiple purposes. He envisioned his own teacher website enabling classroom routines and students' work habits, and students' acting as vehicles for meaningful experiences with the established curriculum. Composing within his website affected what he planned for students to compose within theirs, specifically as he positioned students' individual websites as year-long portfolios. As he planned, Russell consistently sought to fulfill the goals of his distributed departmental context as well as his own goals regarding students' authentic ownership of their own learning.

**Composing texts for use by self and students.** When I talked with Russell in August, the main composing activity that he described was constructing his website. Created the previous year, this digital space was intended to serve a variety of purposes. It would act as a vehicle for classroom-related information, a "launch pad" for daily routines, and a template from which students would create their own websites. As an accruing instantiation of his planning practices, his website afforded him access to previous artifacts (including pages, links to previous students' blogs, and daily agenda blog posts). Referring to these posts, Russell said "what is nice is that I can just basically bring it back and make whatever adaptations I need to." Russell's teacher website made available past iterations of classroom activity as resources in planning for current activity. In addition, it was intended for future activity too: planning on a longer-term scale, Russell hoped to use some of this year's student websites as models for future classes.

Texts can play an important role in planning for ongoing classroom life. Russell planned for multiple ways his website would facilitate classroom routines in the upcoming year. He said that after students all created their own websites, he would copy and paste each of their URLS within a Google Spreadsheet, then link that spreadsheet to his teacher website. Having easy access to the spreadsheet would make it easier for him to navigate to student websites (enabling his reading and assessment) and for students to navigate to each other's sites (enabling dialogic classroom activities like commenting on each other's posts). Russell also explained how the blog page on his website would be a regular feature of the classroom routines. He intended to have a post each day, saying, "it's sort of used as just kind of a launch pad for each class." He expanded, "So, for example, and I've already got this sort of [plan] -- Day One, we'll just kind of have like an agenda up on the [whiteboard]." Planning for that first day included envisioning the website projected on the classroom whiteboard, foregrounding the role that texts play in

making plans. As Russell anticipated his website in general and specific moments with students, he wanted this website to be a text-in-relation to the ongoing work of the class.

What teachers make for instruction can influence what they ask students to make. Russell intended for his website to serve as a model and template for his students' websites. He organized the structure of his webpages so that there was one page per upcoming curricular unit. This way, when students made their own websites, they would mimic the structure and copy/paste the unit's essential questions he provided on each unit's page. Each student would then have an empty 'portfolio' ready to hold each unit's major assessments. Russell said, "So, if they write an essay, then I will have them publish that essay on their page." He also intended students' websites to act as vehicles for their connecting the departmental requirements to authentic learning, adding, "Then there has to be maybe some project-based element that could also flesh out the unit, and tie a lot of those things together. So, something that takes them out of the literature and maybe a little bit more into the world." As he planned for each unit's page, he envisioned it holding the departmentally-required essay, as well as an artifact of project based learning. Russell saw the digital sites as enabling connections to authentic learning and to the required curriculum, as well as providing opportunities to build skills authoring in a digital platform.

Russell's intentions in creating his website shaped the talk and questions he envisioned in future interactions with students. Based on the past experiences with one digital blogging platform – WordPress – he chose to switch back to a platform he had used in the past – Weebly. Weebly's design features make it easier to work with multimedia artifacts and is generally less text-heavy. Russell's mediational choice impacted how he wanted students to focus on blogging, and he said, "I really want to go back to making their websites portfolios." For students to create

websites that would collect their work over time related to Russell's fulfilling the purposes of the final exam. Russell stated his intentions through voicing of his not-ideal future self and his ideal future self:

> And for their final exam, as long as my department -- my PLC -- is okay with it, you know I would like that to basically be their final exam grade. Is to kind of say,
>
> "Okay, let's look at what we did this year,"
>
> and sort of find some way to assess their work throughout the semester, instead of saying,
>
> "Okay, now, write an essay about all the things that you've learned!"
>
> And instead, just say,
>
> "How have you grown? Have you collected everything?"
>
> something like that.

Russell planned for institutional requirements, over time, and not for the entire learning to be in students' heads, but instead grow through their interactions with the artifacts they made. The ongoing process of creating websites was intended to mediate multiple learning experiences. Russell, planning himself into the scene, anticipated his ideal future activity as also oriented toward his goal of authentic and public learning opportunities.

In addition to envisioning his own role in relation to the websites-as-portfolios, Russell's intentions in creating his website shaped what he envisioned his students saying and learning. Russell saw multiple uses for the students' website, including building digital skills. He evaluated the resources he had to work with – the curricular-required texts – in light of his own judgment and from the perspective of his students.

> I guess [each student's website] sort of serves a dual purpose. On one hand -- I just like it as an idea to sort of -- just pedagogically, to say,
>
> "This is where I was at the beginning of the year, and this is where I wound up at the end of the year."
>
> You know what I mean? So I guess the broader purpose that it serves is to kind of be able to look back over the things that we've done, and kind of say,
>
> "This is how I grew this semester -- evolved."
>
> .

Russell's two purposes – to provide a record of the year's work and to provide an opportunity for metacognitive reflection on learning – were results that he hoped for when students created their websites and the texts that the websites held. Through voicing an 'ideal' student, Russell articulated how he envisioned students taking up the potentials available in the digital portfolio.

Russell's website involved composing for multiple audiences: himself, himself with students, and students-for-themselves, all while fulfilling the district requirements of having a Speaking and Listening assessment. When he composed his website, he drew upon his past experiences and texts he had available to him. When he envisioned the website in configurations with students, Russell focused on how the structure enabled navigation and finding resources. When he anticipated students for-themselves, he situated their use of the website as agents of their learning. The websites, motivated by multiple givens and goals, demonstrated one way that a teacher situated texts within a local activity system and negotiated the roles that he and his students would play with those texts.

**Fulfilling multiple purposes.** In September, Russell described what students had accomplished thus far. They had all made websites with blog pages, modeled on Russell's, and he noted that many students had made design choices that reflected ownership over their sites.

While his intentions for students' websites had gone well, he was disappointed that his intentions for project based learning hadn't developed from the work of the class. He said, "at the end of the day we weren't topically discussing the kinds of things that I wanted their first project to be geared around." Thus, based on what *had* happened, Russell felt that he needed to re-calibrate his planning. Reflecting forward, Russell said that his experience in the fall shaped his planning for when he taught the same unit next year, and he intended "to find more ways to work in discussion of those things." When considering his orienting purposes – to incorporate more project based learning for student ownership of their learning – Russell's planning took on multi-year time scales.

As all teachers find themselves doing, Russell negotiated his own purposes with those of the school and departmental context he was working within. In his case, Russell needed to administer the departmentally-created unit exam, but reconcile doing so with his orientation toward authentic learning. So, he had students design a webpage on their website that answered the questions of the departmental exam in a way that included digital media. When I spoke with him, he had just administered the final exam and explained to me how he was using the test requirements and asking students to make meaningful connections to the curriculum:

> [For the unit final] there's not a mandate that says it has to be taken in a defined period of time or space. They have to show that the objectives are being met. And so from my perspective, what I value about learning, does it matter that they can do it in a condensed time period, and still get good answers? They took three days to take this. And I am looking at that as a good thing, in terms of the care they're taking into crafting their responses, crafting their pages, becoming digitally literate, while they're processing these concepts about a text.

From the perspective of the department, all students must take the exam to demonstrate they met the unit objectives. Russell focused on that requirement and, instead of maintaining the genre of

a paper-and-pencil written exam, translated it into a form that was familiar within his own classroom context (i.e. students using their websites to demonstrate their learning across the year). While he had planned for only two days, his choice to extend the time allotted for the task was made in response to his students' investment and engagement.

This assessment also served purposes for Russell that extended beyond the unit itself. For example, one part of the assessment involved students recording themselves telling about a topic in three different narrative voices (note: an architecture informed by the text they had just read). This recording enabled Russell to fulfill the Speaking aspect of the Common Core goals. For students, he said "practicality wise, it can exist in [students'] portfolios as evidence of their ability to speak." At the same time, the students would have an artifact to point to as a complement to their having spoken in class. Russell also had a broader goal about developing skills with digital tools:

> But what is nice about this is that they now sort of have a comprehensive record of that speaking, whereas if they were to give a speech in class - which they also did - but this way, now they're sort of like a documented record that they're speaking and they can actually keep it as part of a portfolio.

He added:

> I think it's just sort of like a general sense of sort of like understanding different digital technologies and competence.

In addition to fulfilling the requirement to address the Common Core speaking standards, Russell intended for the students to leverage the digital medium to document their own growth. In addition, he wanted the project to apply to the broader development of their skills with digital media compositions. While neither of these might be students' explicit purposes, Russell's evaluation of the assessment aligned with his broader goal of enabling students' authentic learning experiences.

As Russell looked ahead, he continued to see his purposes with students' websites align with the requirements of the department. In describing his hopes for the required final semester exam, Russell returned to his intentions for students taking ownership of their learning. He had been talking to the department head about how his desires to do a portfolio didn't dovetail with the paper-and-pencil final exam and, hearing that the department in general was going to start moving towards portfolios of student work, described what he would ideally love students to do and say after completing this unit:

> My hope is that - and my department chair seems to be on board with this - is that instead of like a [semester] final exam they can have sort of a defense of their work.
>
> I mean stand up in front of the work and say
>
> "This is what I did"
>
> instead of answering a bunch of random questions.

As his planning evolved, Russell voiced his students as articulating their pride in the work. His doing so was a return to his orienting intention that students would find authentic purpose in their work. While Russell's use of digital portfolios was novel in his department (two other teachers asked students to keep paper portfolios), his department head's encouragement was partly in relation to longer-scale district shifts towards standards based grading. As Russell planned to fulfill his personal goals of these specific students taking ownership, he was also making plans in longer chronotopes of his local context.

Teachers must fulfill multiple purposes when planning, orienting to a constellation of audiences and stakeholders, some more compelling than others. As Russell planned, he negotiated the multiple purposes at play, chiefly between his department's and his own. His department's goals, intended to ensure students received a standard experience, provided

particular givens. Russell wanted to ensure that he fulfilled those intentions, but did so in ways that opened up opportunities for students to take ownership of their learning.

In both interviews, Russell's description of his planning focused on how he leveraged the website for students to find value in what they're doing. He used his website to keep track of day to day classes, model digital organization, and provide access to district requirements. He evaluated the logistics of online tools (when he made the choice to switch back to Weebly) and positioned them as enabling resources for the students. Using the website/blog, Russell fulfilled multiple purposes to various audiences (ex. students recorded last unit's final speeches and learned how to embed them on their blogs and these speeches also counted for the 'speaking and listening' departmental assessment). Oriented to his students as the primary audience, Russell leveraged distributed means to plan for his upcoming instruction.

## Conclusion

Kirra, Sahra, and Russell's accounts of planning draw attention to the relationship of individual teacher's interests, beliefs, and experiences to their curricular contexts. Each teacher planned to fulfill their intentions and, at the same time, to meet the requirements of curricula and standards. They did so by planning opportunities for student activity (specifically for inquiry and ownership) *and* for their own activity (generally what their role in enabling student activity might look like). Each teacher noted the role of other people in their planning process, from colleagues to area educators to department heads. Consistently, these teachers described out of classroom experiences in relationship to anticipated classroom scenes. In addition, these teachers' planning worked in multi-year time scales: from Sahra's drawing on texts that students did two years ago to Russell's hope that students will take their learning far into the future. As these teachers envisioned possible classroom scenes, they voiced their students and themselves.

When they voiced themselves in those classroom scenes, it was often the questions they would ask or the instructions they would give. Other times, in laying out a possible future, they voiced an ideal student and what he or she might say as a result of learning (and, in Sahra's case, the 'not ideal' student who was confused). Highly social, in the processes and potentials, and distributed across time, space, and materials, these teachers demonstrate the highly situated nature of planning in contemporary contexts.

# CHAPTER 5

# PLANNING: A RESPONSIVE PRACTICE

In this chapter, I present narratives of three teachers who describe their planning practices. Like in Chapter 4, this data draws from interviews with the participants. These interviews – and the texts the teachers shared within them – helped me consider the multiple ways the teachers saw themselves planning as agents within their specific contexts. The cases are organized into two sections: Cora, who described planning for students who were newcomers to the United States; and Amelia and Eliette, who explained how they prepared for teaching their respective Social Justice elective classes. Within and across these sections, I find that planning is responsive to its local context.

## Planning for Newcomer Students with Interrupted Formal Education

In this section, I present data from two interviews with Cora, a teacher of students who were new to the United States and who had experienced interrupted formal education (often referred to SIFE students). During the year of the study, her students ranged in age from fourth to eighth graders. With mornings in a self-contained classroom, a small population of students with extremely diverse needs, and one teaching assistant, Cora's planning practices demonstrate how planning is consistently responsive to her students.

### Cora: Attending to Students' Needs

Cora's students ranged in age from eight to fourteen years old, and were three to sometimes six or eight years behind in literacy in their native language. In addition to being English learners, Cora explained that her students were "behind their age group when they come to the United States and then they're new in the United States so they're also learning English, learning the culture." She described her classroom as "basically a Montessori classroom, if you

want to look at it that way. For non-readers and low-readers from other countries." In form, program, and curriculum, Cora planned for environments that would meet the needs of her students.

Cora started the year with seven students and was up to ten by mid-fall. At that point, she was expecting about four more – "because it's a newcomer program, so as they come, they come." The year of the study, she had three students who returned from the year before, though she said, "I don't plan to hold anyone over. By design this is not supposed to replace school. It's supposed to give them like a sort of step up into the system." She noted that the three who had returned were leaders this year in ways that they hadn't been the year before, and that students "get really different things [from the program]." While the goals of the program included supporting students academically by focusing on literacy and numeracy as well as them socially (developing socio-emotional skills), Cora added that,

> People who have been morbidly shy and unwilling to speak become like advocates for their group and themselves in a classroom. Or, you know, some kids learn what's expected when you're in a classroom. Some kids learn intellectual things, like writing skills -- other kids come out with a sense of belonging because it's like a cohort feeling. So they carry that into their [mainstream schools], where they have like actual friends instead of being alone.

There were multifaceted purposes at play here – for the program and for the students alike – that Cora took into account as she planned to meet her learners' needs. These purposes extended the academic focus of planning to make explicit how related social, emotional, and cultural contexts are always at play when teachers plan for instruction.

As Cora designed curriculum for her population of students, she accumulated knowledge from a variety of resources, including the literature on SIFE students. She was frustrated with the scarcity of this literature, noting that she had found people who wrote about teaching refugees or

about teaching Adult Ed, but that it was difficult to find research regarding SIFE students. The research she *did* find shaped her curricular choices, specifically in how she chose to do more project-based work. Cora said that the authors that have written about this population of students said that "people who are low literacy work better on project-based, portfolio-based things, so that's what we try to do." The integrated premise of project based learning, which maintains a core topic and weaves in content accordingly, made sense with how Cora wanted to maintain the "frame" with what they were working on. She explained,

> So, I try to like make things make sense across the days so that we're not resetting the frame all the time. We're not going to do like a reading and then let's say they were reading on water recently. I'm not going to be like,

"Here are four math problems that are word problems and they are about bubblegum,"

> You know, like [the problems are] *also* going to be about water, because shifting frames is so costly. The initiation cost of shifting frames with SIFE kids is really high so you can't just grab from anything.

Attending to her students' curricular needs, Cora planned for instruction that integrated literacy and math skills under similar topics. This was responsive to her specific group of students because of the many new things they were working with across academic and cultural contexts. Doing so, however, affected what kinds of resources Cora could "grab from" because she needed it to align with what her students were already doing. While she had a range of resources in her toolkit, Cora could only take advantage of some of its tools in relation to the needs of her specific students.

**Supporting conditions students need in order to learn.** Cora supported her students in multiple ways so that they could enter the classroom. Cora said that she did three home visits

before the beginning of the year "to make sure that the kid knew where they were going physically as well as that they were not *just* going to be at their [assigned school] and why." These home visits involved explaining the morning / afternoon structure of the Newcomer's program as well as drawing maps and walking with parents and students to their bus stops. Cora also gave her phone number to parents so they could text with her. Cora found relationships with parents to be essential for "discipline and work reasons. But also, just like if they are your fan and know you're on their side." In other words, by teaming up with students' parents, Cora assembled a constellation of supports around them, and gave herself particular connections to work with.

Cora was acutely aware of potential barriers students might be experiencing that would affect their entry to school. Part of Cora's support extended to helping mitigate these barriers. For example, she told me about one family she worked with who were experiencing quality of life barriers - they didn't have shoes that fit or a working AC unit in their apartment. "It was hot and they were having to keep their windows open, no screens and nobody was fixing the AC so I called their landlord." She said that it's not normally what a teacher does, but that these things must get done if her students are even going to be in school:

> And it's not that I want to do that instead of doing extra more planning about reading or math. It's that they won't be in that seat if I don't do it. And how do I know that and I'm not just being paranoid? Because they will not be there. Literally that happened on Friday. Yeah. So, I know it from experience, so that's how I know it.

Cora's actions, taken before school starts or before a family enters the program, highlights one assumption that people can make about planning: that students will even be at school to teach. By building relationships with families before they come to school, Cora enabled students' physical access in order to enable curricular access.

Planning for the diverse needs of her small number of students, Cora worked with other professionals to prepare for instruction. Every day, Cora worked with a teaching assistant, whom she described as "basically like a teacher, because she has to be." With the small number of students in her class, Cora often had other adults in the room "because these kids are like literally at their own level." While she had a consistent aide, she said that,

> I think my classroom runs ideally with three adults who know what they're sort of doing. By know what you're doing, meaning they perceive that these kids are different from each other, that they need different prompts and they need to be pushed differently.

The other adults that Cora sometimes had in her classroom included volunteers from the community, student volunteers from Midwest University, and sometimes people she knew from parent and family networks. Cora, by working with these other adults, was able to provide situations for students that were responsive to them as individuals. Her ideal set-up then, meant she planned for situations that she was not always a part of, and were not dependent on whole group instruction. Her students needed different supports, and distributing adult attention and configuring the classroom accordingly was key to providing that.

Cora described how her short-term planning supported her students' learning paces. She said that mapping out a unit or longer, "in a linear fashion didn't make any sense for my class nor did planning for just one day. So, I have to look at least a week or two-week thing." When planning more immediately for her students, she said that she looked closely at only the next two to three days, and that doing so enabled her and her TA to "cycle through the thing that I want to accomplish." She went on to say two to three days, because "[The students] are so unpredictable." In this planning, Cora described herself as "constantly creating" to help her meet students' needs.

> I am pretty good at when I meet a new kid and we do something

> that we did last year and they don't get it, I'm pretty good at tracking back. So basically you design something that you think most people can do and you give it at least two if not three levels of differentiation. And then when that doesn't work you try to backtrack in a sensical way to bring in that person, or you change the expectation for that person.

As Cora evaluated the materials she has available to her, she does so in light of the needs of the students in front of her. Her process, of finding one resource and working from it to differentiate accordingly, offers insight to how teachers assemble and revise materials while they are planning, changing them for their particular students. Cora's planning to be flexible with curriculum and with materials highlights the conditions that she sought to create for her students.

**Arranging meaningful groupings to support students.** Cora planned for situations early in the year to learn about students' individual literacy skills to give her enough information for her to start out. She said, "I know who can read the first three lists of sight words, for example, who can pronounce letters. I know who can't. And so, I need to have separate things for them." Using this information, Cora characterized how her students' varying literacy skills affected how she grouped them. With a variety of needs, ages, and languages in the room, Cora had to negotiate these factors in light of socioemotional and academic needs. She said:

> Three [of my students] can read, four cannot read at all in any language or write. Even within that group, the four that can't read, there's one that's going to zoom ahead. I can already observe that in her. And one that it's going to take a lot. And the kind of sad thing is often the younger kids go faster than the older ones so you can't always group together people with the same level in the same group because it's kind of discouraging for the older people. The natural group is the eight year old and the fourteen year old. If we were just doing sound knowledge, letter recognition, reading level. Here's the other thing: out of the four people that cannot read, three of them are the best speakers in the class and one of them doesn't speak hardly at all.

Cora's knowledge of her students was based on both what they could do and what they could not

yet do. Using this knowledge, she planned for various groupings that would help her students (and avoid the ones that would not). The variables at play here show how complex responsive decision making is.

Planning to support students' varied needs happened in relation to the native languages that students brought to Cora's classrooms. Her Q'anjob'al speakers "are really good decoders. Can pronounce all of the words. [But they] don't know what any of it is," whereas her Lingala speakers were "guessing the words… but if I read it to them we can have a whole discussion about it." Taking her students' literacy strengths and weaknesses into account, in relation to her being with students, Cora said:

> So it's like I have like two parts of the brain separated into two people, you know, like and so I have to plan for that too. So sometimes if I'm there to mediate that, like both people can feel like they have something to do. Like one guy can be the reader while the other guy's the kind of like the discusser but if they're listening to each other that can be really good. But if I just put them together they're not independent yet.

Cora planned for students' strengths as well as how to leverage them to address their learning needs. In setting up different roles in a partnership, she anticipated how she would also play a role in facilitating it. Planning for her students and herself, and what configurations would help her students (and which would not), are ways that Cora envisioned meaningful instructional groupings in her classroom.

Thinking about whole-group instruction, Cora's deep respect for her students appeared in the way she established classroom routines. In their daily class discussions, she would shape the prompts to elicit them sharing from their places of strength and knowledge. For example,

> We might be talking about 'what I know how to do' and like telling people how to do this. 'Something that I did that I was really brave,' 'What my job is at my house.' Because all these people are so competent as people. That's something that I really

> want to emphasize - for all the incompetence they have academically and literacy they could raise families right now. And I don't mean just because they could have sex, but because they could actually, no problem, cook, clean, care for children, be human and wonderful to their family and they know how to do that already.

Knowing her students well enabled Cora to push against the ways they are often negatively framed. When she set up opportunities for students to respond to each other based on their strengths, she established the classroom space as responsive to who they were as people.

Routines provided another way that Cora provided meaningful configurations for student learning. Her goals included establishing everyday experiences with academic instruction that also served other purposes. For example, she said:

> I do think it's important for everyone to have reading, even guided reading, for that day, whatever that means for their level, whether they're reading for comprehension or reading for sounds and letters and syllables. That's important. It's important to have some problem solving or math every day. It's important to go outside until it's too cold to do that, so I've been taking them outside almost every day. Like we've been doing the number lines outside. So like, you know, they're learning negative numbers and positive numbers, what that is and they have to add and jump.

Accomplishing curricular purposes inside and outside of the classroom, Cora was also able to fulfill her goals of providing outside time for her students. This attention to what was important to do on a daily basis also informed classroom artifacts that Cora planned for students to interact with. She commented:

> There are a couple things that I try to just get them to do every day that are like -- I have this calendar area where they have to like write the month and the day and there's like dry erase and they have to like look at the calendar because looking at something formatted like a calendar could be new. Like most of them are learning how to read a calendar. So you have like life skills stuff that I'm trying to bring up every day.

Writing on the calendar daily was one example of situated, embodied classroom routines that Cora planned to be a part of her ongoing support for students. Routines like this are a part of the local activity system, and are something that teachers plan *to* establish, and then once established, plan *with* them for further instruction.

Cora's responsiveness to her students appeared in the ways that she knew her students, worked with other adults (parents, aides, and volunteers), and made decisions about classroom configurations. Importantly, her knowledge of and respect for her students shaped her planning for them. With the features of her classroom – a small number of students, self-contained classroom, more than one adult teaching – Cora's contribution to this study helps us take into account the many ways in which teachers plan to be responsive to their students.

### Planning for Social Justice Electives

Amelia and Eliette taught semester-long Social Justice electives at two different high schools in the same district. Each described planning for their Social Justice class as responsive to students, with attention to building community at the beginning of the year. Amelia, whose class was housed in her school's Social Studies department, had taught the class before, but this year would be the first that she taught it both fall and spring semesters. Eliette, whose class was housed in her school's English department, hadn't yet taught the class, but described it as "in many ways, what I've always been teaching." Through both of their narratives, Amelia and Eliette's planning practices were responsive to their local contexts. They consistently described planning for students' activity in relation to their own activity; used their knowledge of students, the course, and the community to make curricular decisions; and anticipated opportunities to learn about their students and for students to learn about (and from) each other.

**Amelia: Referring to, Revising, and Creating Texts as Vehicles for Planning**

Amelia had been teaching for fifteen years, all of them at her current school. In this section, I highlight Amelia's descriptions of planning for her Social Justice class, a semester long elective open to juniors and seniors. Built on her knowledge accrued over the years, articulated in texts and memories, Amelia planned by anticipating her activity in relation to students and by responding to students' interests in relation to the course.

Amelia documented her planning in various ways, reflecting her preferences and routines in relation to her teaching context. Each school year, Amelia kept a spiral bound plan book in which she wrote notes about classroom events (ex. topics, activities, videos), school events (ex. fire drills, department meetings), and events that would affect home life (ex. a union negotiation meeting that her husband was a part of). Amelia described starting her planning process by referring to her physical plan book from the year before:

> So, I'll go back through and, if it's a class I've taught before, every year I do it I try to write in notes, like if something worked, this was great. Or if I find additional resources, I add it in, so that the next year, when I go back, I can look through and see, okay, I did this at this point. This worked. This did *not* work. This is re-do the whatever thing. So I try to -- sort of wrap my mind around, okay, where was I, broadly speaking, at the end of August? Where was I at the end of September? End of October, all of that."

In looking at past notes, some of which she wrote in anticipation of this very review, Amelia reminded herself of previous experiences to build on (or to avoid). Her evaluation attended to pacing according to the months of the semester. She also evaluated the past to take up what had previously worked. Amelia's plan book, as textual instantiation of her planning, enabled her to trace both an overview of what she had previously done and specific activities and resources she had used, all to inform her upcoming semester. This particular documentation practice leverages

texts across time scales that begin at least a year before planning for this specific semester and extend into the possibility of using the current text in the future.

Plan books provide one narrative form to review, but are only one of many types of documents that tell the story of past instruction. As a complement to her year-long plan book, Amelia prepared for her Social Justice elective by referencing and revising a Google Slides presentation. This digital artifact consisted of slides for the entire semester, including slides for activities and specific discussions. The slideshow was informed by materials of two teachers who had taught the course previously in a neighboring school district and who had shared their ideas and activities. Each year, Amelia created a copy of the previous year's slide presentation and updated it. As we looked at it together, she explained,

> I change it every year. This is this year's incarnation. And then [I] add, subtract, put in links to videos, activities, those sorts of things, each year as they go on. So kind of keep a record of what I've done in the past, and then kind of -- beef it up, or change it, or however -- I alter it every year to reflect what my students and I are looking at.

This multimodal text, informed by past iterations and a variety of resources, acted as another textual instantiation of the course. It was intended to reflect ongoing activity as well as become a reference for the future. Additionally, Amelia noted that edits for the presentation were made in light of the students she taught at that time. In each of these ways, the presentation served as a vehicle for anticipating classroom activity in response to the contexts that she and her students shared.

Referencing past plan books and the Social Justice Slides presentation, Amelia planned for the upcoming semester by writing in her current plan book (see Figure 5.1). Her jottings included directives for what to do (ex. "Finish / Discuss Interviews") as well as titles of activities (ex. "Social Justice definition"). Some notes were shorthand for the unit topic (ex. "Identity +

Power" as the introduction to the Identity and Power unit) while others directly referenced specific slides on the slideshow (ex. Power Wheel), and some indexed both. Amelia used bullet points and arrows to indicate separate parts of the class period (and, as can be seen in the African American History class column, how some activities continued into the next day). Amelia also wrote down school routines, such as having a late start on Wednesdays, or jotted down specific events (e.g., No Classes on the Friday of the pictured week). Rather than stand alone as representative of a teacher's planning, plan books act in relation to (and often explicitly reference) other texts, speech, and situations. They serve as one mediational tool for teachers to accomplish many social and situated tasks, among them remembering things they may otherwise forget (in both the short and longer term) and documenting their planning. As historically and culturally informed texts, teachers take up plan books in ways that enable them to accomplish complex distributed cognition in their local context.


**Figure 5.1: Amelia's Plan Book for Week 2 of School**

While planning is often textual, not everything a teacher intends to do is textually inscribed in their plan book. As Amelia paged through her plan book, showing me what she had written out through the middle of September, Amelia considered herself "planned up through" for Social Justice, and "almost there" for AP World History. But she also indicated *another* sense

of being planned, in that she had thought through what would happen but hadn't yet written it down. She said, "African-American History, I am planned, it's just not written down yet. But I know -- I know where I'm going with all of that." Also not yet written down were some more tentative ideas that Amelia had for the Social Justice class, which drew upon local resources available to her as well as her past experiences:

> Jen from the [local LGBTQA+] Center, maybe see if she could come in and talk to the kids at some point, about that sort of thing. There's a great documentary about Harvey Milk that I watched last year. I happened to be gone one day, and I had watched it, knew it was good, had the sub start it, and kids loved it. It was a great way to bring my background as a history teacher into the Social Justice class.

This short list of potential opportunities that might come into her Social Justice class connected to Amelia's relationships and her interests in (and professional experience with) history and film.

Reviewing, revising, and creating texts can all serve as vehicles for planning that is responsive to the people it involves and the time period within which it takes place. Amelia's use of her plan book (both this year and last year's) enabled her to review and evaluate the past as it might play out in possible futures with her current students. Revising the Google Slideshow presentation enabled her to bring in current resources for her and her students to work with. By creating various annotations, Amelia instantiated her intentions for her future self to refer to. Based on past experience (self and with students), she had thought through plans but not yet inscribed them. All of these examples show that planning is not *in* a text nor is it *in* a teacher's head, but a practice distributed across texts, mental processes, social situations, and time.

**Framing self in relation to students.** As teachers orient to the classroom, they establish themselves in relation to their students, an especially important practice at the beginning of the year. When I talked to Amelia in August about planning for her Social Justice elective, she

expanded on her practice of reviewing what she had done in past years to talk about how she orients herself (and the curriculum) to students, saying, “I know each year I kind of see how things sort of go with the kids, what their interest levels are, or what they're passionate about.” In addition to this stance of teacher-as-learner, she said she also considered various time scales and contexts as she thought about “within one school year, how things might shift and change, depending on the kids that are there, the time period, what's going on in the country, in our community, that sort of stuff.” Taking stock of what she has done in the past, Amelia drew upon her previous teaching experiences to anticipate classroom activity (hers and her students’) that would build her ability to be responsive to them and their ability to be responsive to each other.

Amelia’s planning practices demonstrate the important role teachers play in enabling access to materials of a learning experience, for a lesson or over a longer period of time. These materials, such as class notebooks, writing portfolios, or journals, don’t just appear in students’ hands, ready to be used in highly situated practices. Teachers must plan for the materials *and* how to frame students’ introduction to (and use of) those materials. Amelia provided each of her students with a journal and established classroom routines for ongoing journaling. In talking about how the journals were intended to play out in the class, Amelia also voiced what she says to her students. These reported instructions served to illustrate what she did and also clearly marked the purposes and roles involved in the use of the notebooks. She said,

> I buy composition notebooks for all of them, and they get those for the whole semester, take notes in them, write the reflections in them, have a dialogue with me in them. And I let them know,

> “No one besides me will ever see this unless you want to share it. If you have a question for me, ask it. I will respond. This is for you to reflect and ask questions and work through this

concept of social justice."

The notebook served as a multi-purposed tool in the local activity system of the class. In addition to housing ongoing routines like class notes, the notebook was meant to provide a direct medium of communication between Amelia and individual student writers. Knowing that the class raised sensitive issues, Amelia defined the journal's purposes and articulated her activity and students' activity in relation to each other. Framing self, students, and text (journal) in relation to ongoing work of the class enabled Amelia to be responsive to her students collectively and individually.

Voicing anticipated speech was common among the teachers I observed in how they envision their future selves interacting with students. As with the above example, doing so can serve as a way for teachers to narrate their role a possible future 'scene.' Having taught the Social Justice elective multiple times, Amelia emphasized the importance of building community in the class at the beginning of the year. One of her first activities involved students' names. This multi-purposed activity would enable students to think about who they were, get to know each other, introduce the themes of the class, and enable Amelia to get to know them. Amelia told me about the activity, starting with what students will do, and then alternated between her voiced instructions and what the class will do,

> They tell the story behind their name --

"Why do you have it, what does it
mean to you?"

> And then there's some questions, and then on the back, they make -- we sort of put in that social justice angle, like

"How do you feel? does it change how
people -- or affect how people perceive
you? Like, if they just hear your name?"

> And you get a lot of different responses from different kids, based on background, and you know, cultural norms for their groups, what

have you.

Amelia's role as questioner serves as the backbone to a sequence of activities where students tell their name, answer questions, and interrogate their identity position. The diversity of responses she expected enabled Amelia to evaluate this activity in light of the intentions she had for building community at the beginning of the year:

> Getting [the students] to talk about this, and hear each other say these things, is a good way to sort of move into that development of sense of community within the classroom, and
>
> "I can trust these people"
>
> and that sort of thing. So that's always been, I feel, good.

Based on her past iterations of this activity, Amelia planned for this activity specifically to help develop a sense of belonging in the class. Her questions and the activity itself hopefully evidenced in the general feeling that students would feel more comfortable with each other.

Amelia also planned to give conceptual tools to students if they struggled with things that their classmates said. Amelia also was intentional about how discussion was intended to work in relation to the ideas of the class, and how she anticipated the role of norms:

> One of the discussions we have at the very beginning of this semester is how we're all in different places when it comes to our understanding of social justice, and we're talking about some really difficult topics. And people, while working through these things, will sometimes say some kind of messed up stuff. And you might be like
>
> "Wow, how could she say that?"
>
> But they're thinking,
>
> "This is -- my parents taught me this. I respect my parents. This is how they think."
>
> So trying to work through some of those things, so we just always give everyone the grace to be learners here. Like, we're all trying to understand.

Through both the notebooks and discussions, Amelia looked to establish configurations that would support students working through the topics of the course, individually and in conversation with others. She also sought to position herself as giving the space and support for others to be learners. Through class discussions specifically, she intended to give students tools for them to be responsive to each other.

Class discussions served multiple purposes for Amelia, including developing a classroom culture and relationship building, and they also provided her with a chance for students to see her in a specific way:

> [Having discussions] can help sort of create that community, and the trust, and let them know I'm there to listen -- I'm not there to judge. I also let them know I'm much more of a facilitator in these -- so like, I'll participate in some of these activities, too, so they know I'm not just judging what they're doing. I want them to feel like they know me, and know that I trust them with my stories. So I'll tell them about, like, why Mr. Walton is -- you know, I'm married to Mr. Walton, but I don't have his last name, and sort of the backstory behind that. And why my name is important to me, and I think it helps them to see,
>
> "Okay, so she's human and all." Like, "She's willing to tell us kind of a painful part of her past, and that's pretty cool."

In planning for community, Amelia anticipated her own participation as having a specific effect. She voiced that effect, again of the idealized student, to articulate what she hoped would happen. Planning for students involved modeling her own activity engaging with the questions and discussions at hand.

In planning, teachers envision their own activity in relation to their students' activity, which enables them to envision how they will establish situations for a responsive classroom.

Amelia's planning for herself in relation to students involved envisioning texts, activities, and routines. Doing so helped her anticipate and be responsive to her students.

**Building curriculum in response to students.** Since instruction builds on itself, teachers plan by building on what they've done with students. Doing so highlights the multi-purposed nature of classroom activity, where a classroom event – for example, an activity within a lesson – might also be part of building a routine *and* developing classroom community *and* mirror an assessment happening later in the unit. The same event might give teachers multiple available features to draw upon as they plan ahead. Leveraging classroom experiences from the semester to the point of the semester in November when we spoke, Amelia's planning was responsive to students as they worked together to develop the course's final project.

Often, when teachers create curriculum, they focus on how students will engage with content, and how that content will inform future instruction. Those plans then come into play with students, and evolve according to many factors. When I met with Amelia in November, she and her Social Justice students were wrapping up some vocabulary building on course topics. These topics, including poverty, class, and intersectionality, were already embedded into the overall plan of the course, but based on class discussions, Amelia described how she had changed some of the course content in response to students' interests, saying:

> I added in a little bit more on poverty and class because that was something that they had showed some interest in when we were talking, particularly when we were discussing intersectionality. Some of them brought it up, this also is exacerbated by wealth, inequality and those sorts of things. So, I wanted to give them a little bit more experience with that.

As an example of how a curriculum 'takes shape' because of the way it plays out, Amelia built from existing structure of the class in response to what students brought to the discussions. This responsiveness challenges notions of curriculum planning as determining a set agenda and

following it rigidly. Instead, responsive planning serves as a sketch of possible opportunities that teachers use in relation to their interactions with students.

Amelia consistently built from activities that she and the students did that semester to inform upcoming instruction. This happened in more immediate futures, for example as Amelia looked to the next week's page in her plan book (see Figure 5.2), she drew upon the recent past to plan for the immediately upcoming days, saying "starting Monday, we'll finish that conversation about working but still poor and all of that." She had written down "Finish Poverty Discussion." Tuesday's plans were informed by semester-long activity. At the beginning of the class, the students had created their definitions of social justice. Working through vocabulary as part of the ongoing class work, Amelia had positioned students to better articulate their motivators and intentions for the final project. Pointing to a spot in her plan book, Amelia said that next they would,

> Come up with our new definitions of social justice. We did that a few days into the semester.
>
> > "Now after we've taken a test, done the vocabulary, now what's your definition of social justice. So what makes you mad, right? And then move that into what can we fix, right?"
>
> That sort of narrows down the discussions about where we're going to go. So that's why that one isn't printed out yet because I don't know where they're going to go yet.

Built from a sequence of experiences – the old definition, the test, the vocabulary work - Amelia could only plan so much until the students chose what they were doing. Her plan book demonstrated the textual version of this-- the Social Justice elective had annotations through the day including "Rage Questions" but then there were blank spaces beyond that. While in one

sense this could be seen as ‘not planning,’ it is instead an example of one teacher planning to be responsive to her students in light of their time together and the content they are studying.

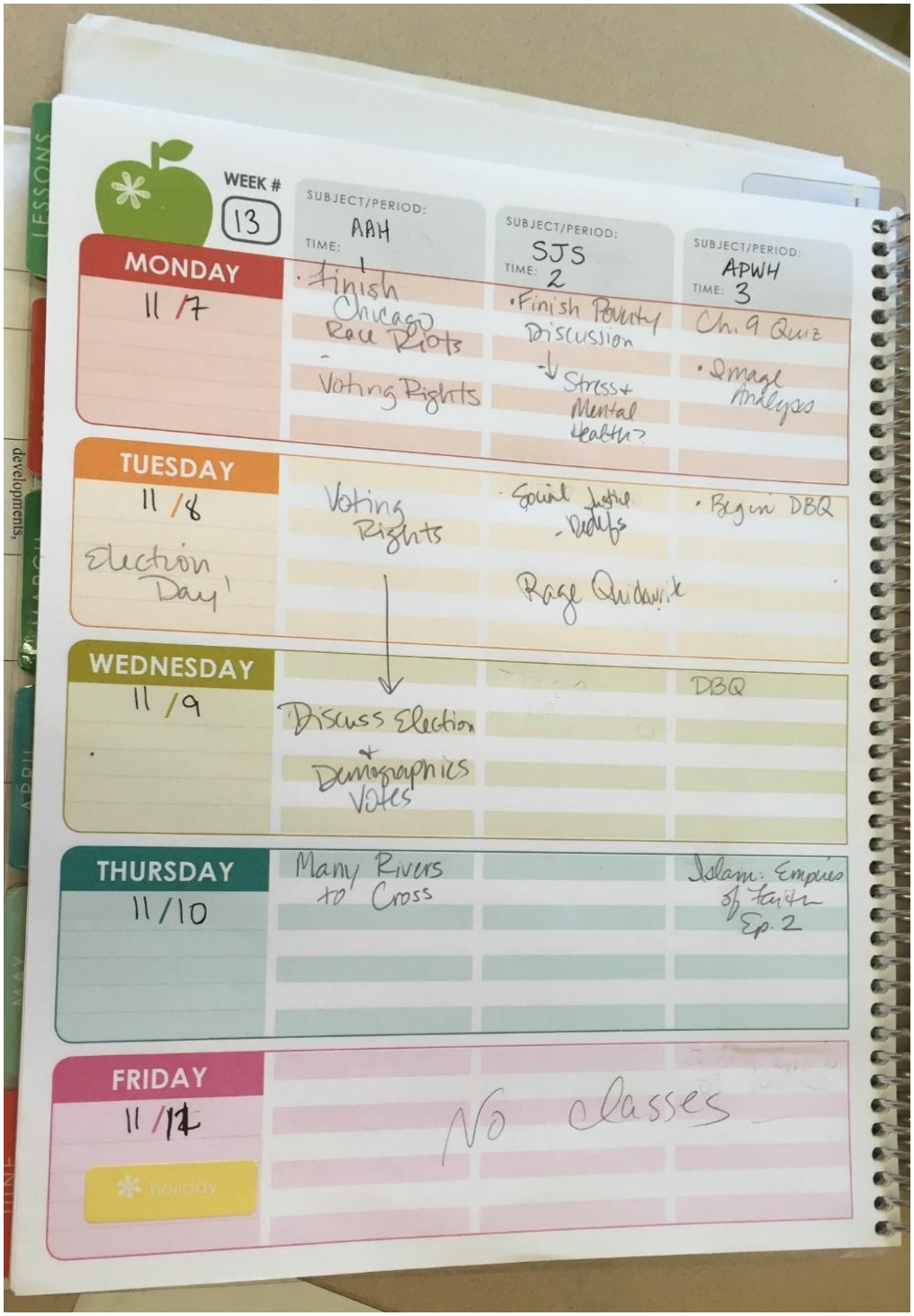



**Figure 5.2: Amelia’s plan book as she anticipated instruction to play out**

Designing for the dynamic nature of student interest does not mean that there is not a structure to the class or anchors for teachers' planning. In the case of this Social Justice class, the course's final unit was designed to draw upon the events of the class, orient to multiple performance-events, and respond to students' interests. Students would choose the topic for the final project, which would begin after they were finished with the current conversations. After the whole class decided on a topic, they would research in groups and present their findings twice: to the faculty and to the Social Justice Seminar that the district held each semester. In addition to these event-based distributed planning factors, Amelia described how student feedback about two possible topics provided direction for her preparation, saying:

> Just based on feedback from them so far, as far as City High School goes, the lack of diversity in the staff, teaching staff, has been one that they've been really sort of interested in, and then the disparities in tracking racially identifiable classes. So really [I] just started to look for relevant materials that could help them sort of guide their research if they go that way, find some background reading for some of the things.

Amelia's planning depended on student activity – it was built from their feedback and relied on their topic choice. She was preparing by finding resources on the most likely topics and, at this point, was oriented towards texts they would read (rather than mapping out activities or anticipating what students would do, etc.).

Planning for responsive classroom curriculum involves designing enough structure in the choices teachers make (about content, events, assignments, routines, etc.) that gives a teacher a chance to learn from their students and make decisions going forward accordingly. Texts mediate this structure, be it through syllabi or plan books, as do conversations and classroom activities. As Amelia built her classroom assignment, she left the topic open to be responsive to

students, but that did not mean she 'didn't plan' for it – her planning was instantiated in choices and events that gave the assignment structure.

In her planning practices, Amelia demonstrated how text and talk work together as teachers anticipate futures with their students. Texts like her evolving plan book reflected the tentative nature within the structure she had set up. Revising her textual Google Slideshow and being responsive to classroom events showed how planning was dependent on activity in the time and space of the semester with these specific students.

**Eliette: Marshalling Resources for a Responsive Classroom Context**

Eliette was an experienced high school English teacher in her 14th year of teaching. She had taught previously in New York City, at both a large comprehensive high school and at a very small democratically-run Title I school in Manhattan. Eliette taught 9th grade English, 9th grade AVID (a scripted college-readiness curriculum), and her school's Social Justice elective. In this section, I trace Eliette's planning at two points in the semester: before she was starting school, and before she was returning to the classroom from maternity leave. At the cusp of both entries into the classroom, Eliette emphasized long time scales that played into *how* she was entering the classroom, and what was framing her anticipation for her students' needs and her own needs.

The creation of the Social Justice course at Eliette's school involved marshalling trajectories of histories into social situations and textual forms. Eliette characterized her preparation for her Social Justice elective as a long-term process that was co-constructed by students and teachers. Eliette traced the genesis of the class back two years, to a student club of which she was the faculty sponsor. The club had come about "as a result of the protests, all the protests that were happening nationally. There became a need for more of that dialogue, and we had the protest, and then we formed a committee." Students and teachers gathered to meet at

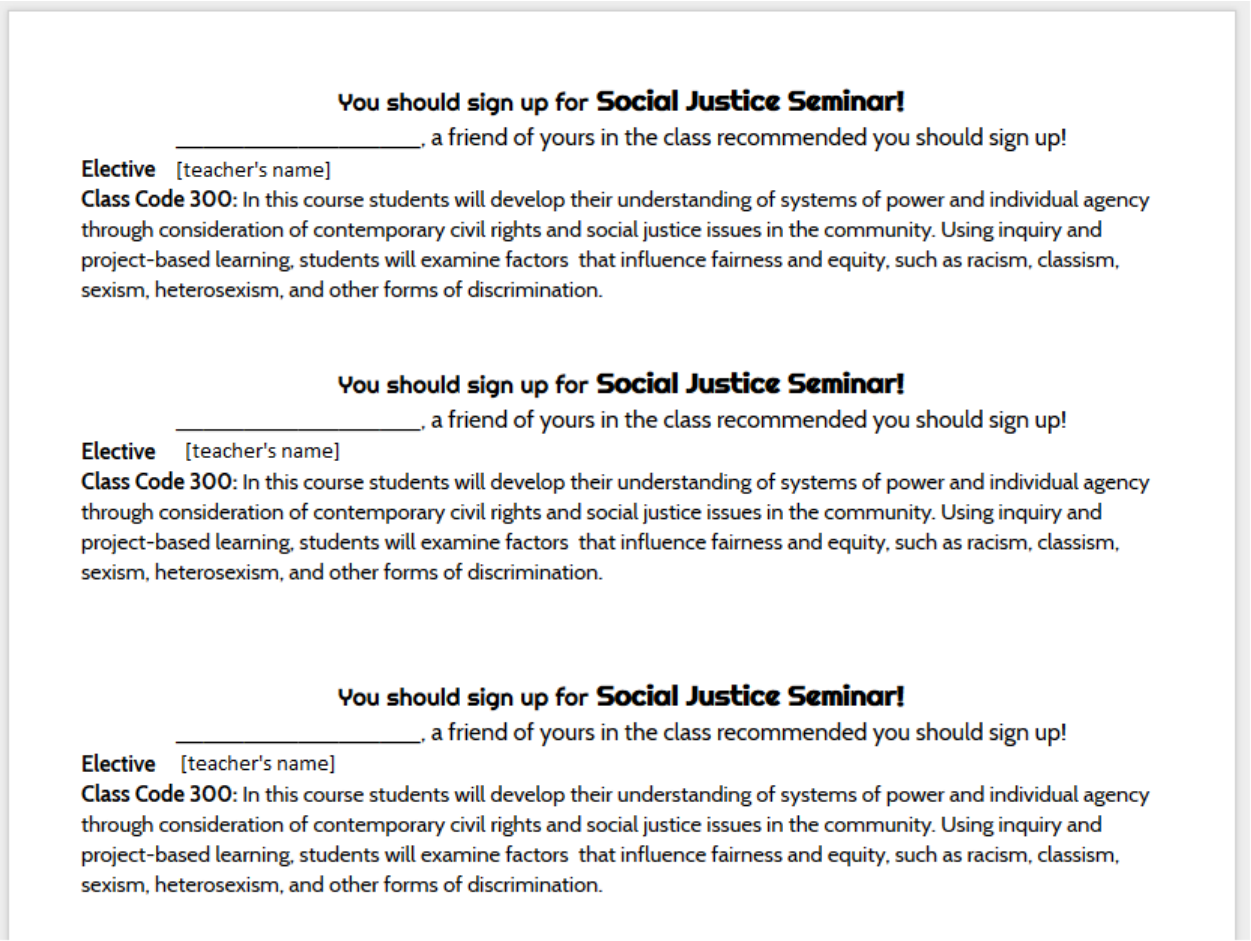
lunch and discuss what was happening, a routine that evolved into a lunch series of dialogues that the group held during junior and senior class lunches, "to facilitate dialogue around student-chosen topics." With participation from both students and teachers, and an intentional centering of student voice, the group's activity was realized in multiple forms. Eliette said that then "somebody raised the idea of doing the class – doing an elective," which she offered to organize. With multiple trajectories converging, this Social Justice class came out of specific time, place, and group of people, showing how responsive its inception was to their concerns and interests, socially and institutionally.

Before any syllabus was written, the overarching purpose and goals of the class were constructed through a series of artifacts and situations. To make the class count for credit, Eliette navigated various situations and composed a variety of texts. This included talking with an established teacher who had taught the class before it was discontinued for low enrollment, and navigating the politics of reviving the course even while that teacher still taught in the building. Students were an important part of recruiting, standing at the registration table, distributing handouts, and spreading news through word of mouth (see Figure 5.3 of slips to handout).

> [The pitch was] that you can an elective credit, that it would be designed along with student interests, and to fit student needs. One goal of the class is to implement a change, whether it's hyper-locally at the school level, locally in [the community], nationally, or globally.

In addition, during the registration period, Eliette made sign-up sheets for more information, which she gave to counselors. Her intentions guided it, as did the language that she inherited from the school's course catalog (see Figure 5.4 for sign-up sheet description). Eliette's purposes were instantiated in multiple ways before the class was even 'a class.' They were informed by the context she was in, including textually in recruiting the course description already in the

school handbook, the ways that students voiced the course, and the materials that mediated its creation and enrollment. Eliette summed up this lengthy trajectory of creation with her own goals for the course, saying “I want kids to come away with the fact that they can be powerful and have a voice.”



You should sign up for **Social Justice Seminar!**

_____, a friend of yours in the class recommended you should sign up!

**Elective** [teacher's name]

**Class Code 300**: In this course students will develop their understanding of systems of power and individual agency through consideration of contemporary civil rights and social justice issues in the community. Using inquiry and project-based learning, students will examine factors that influence fairness and equity, such as racism, classism, sexism, heterosexism, and other forms of discrimination.

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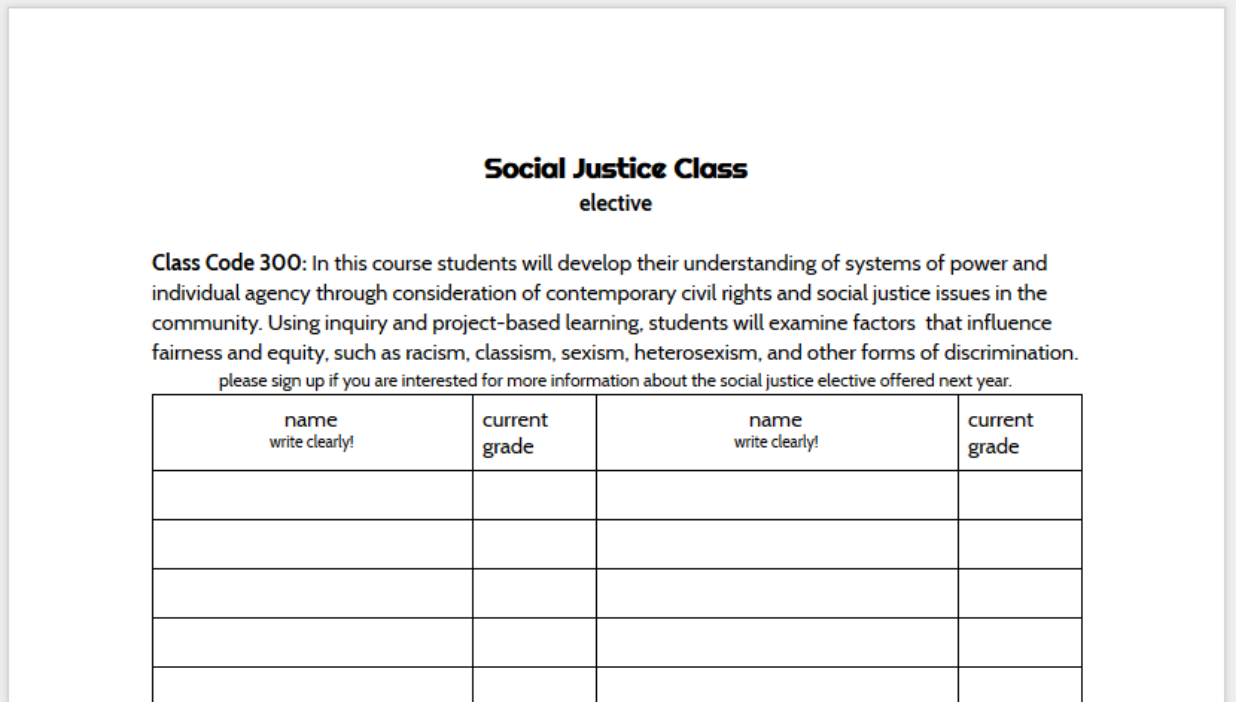
**Figure 5.3: Created Fall 2015 – Recruiting materials for Social Justice Seminar**



**Social Justice Class**

**elective**

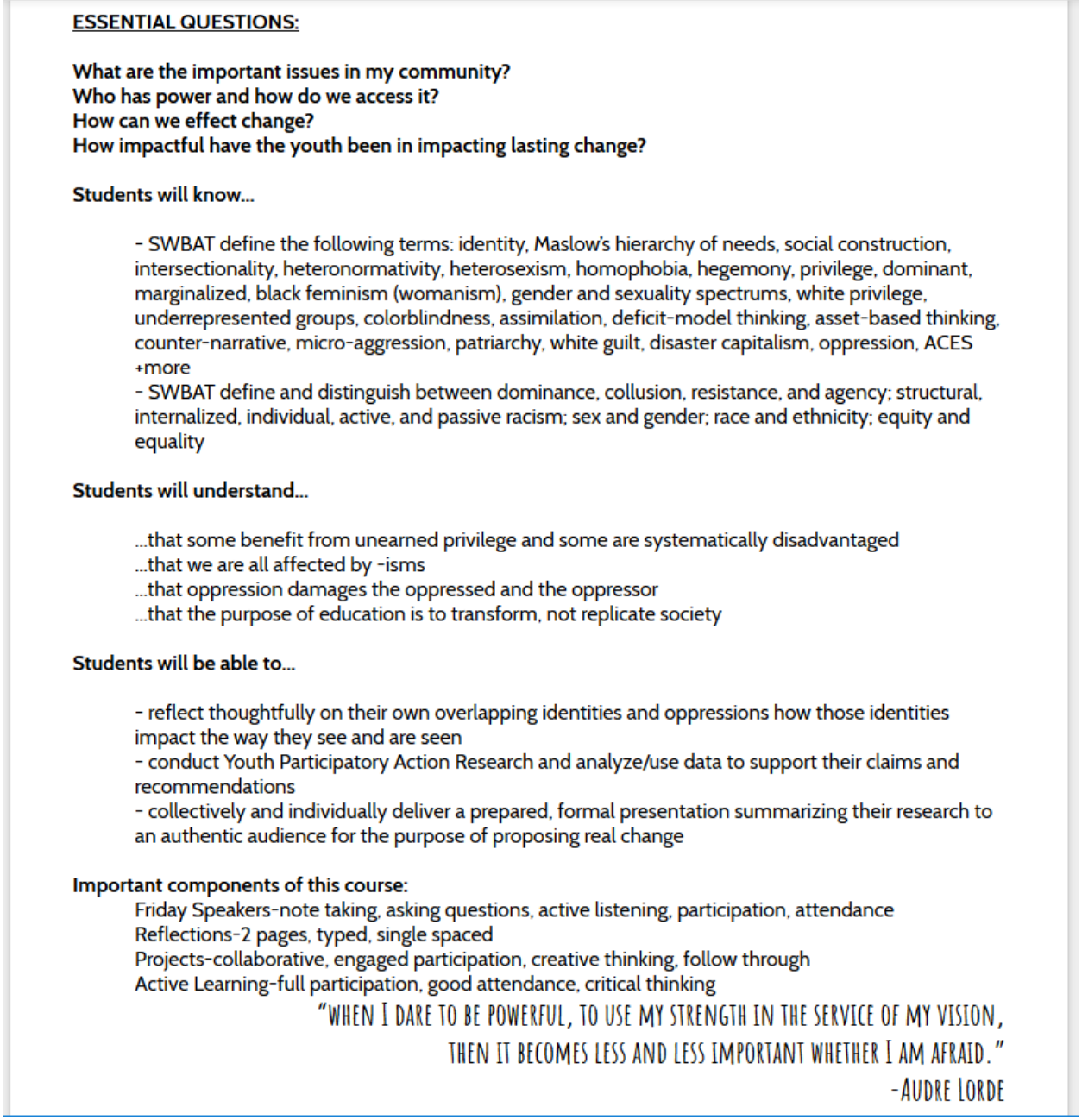
**Class Code 300:** In this course students will develop their understanding of systems of power and individual agency through consideration of contemporary civil rights and social justice issues in the community. Using inquiry and project-based learning, students will examine factors that influence fairness and equity, such as racism, classism, sexism, heterosexism, and other forms of discrimination.

please sign up if you are interested for more information about the social justice elective offered next year.

| name<br>write clearly! | current grade | name<br>write clearly! | current grade |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

**Figure 5.4: Sign-up sheet with iteration of course description**

The class's structure was both institutionally defined and textually articulated. Eliette pointed out that because the class was scheduled at the end of the day, she wanted to work on different activities, and that the timing might help with field trips. Informed by the evolution of the course planning, Eliette had written the course syllabus (see Figure 5.5). With this document, Eliette outlined outcomes such as "SWBAT [students will be able to] define the following terms" and "students will understand that we are all affected by -isms." This goal can be seen in the earlier sign-up sheet and course fliers as "…students will examine factors that influence fairness and equity, such as racism, classism, sexism, hetrosexism, and other forms of discrimination." Eliette outlined core class activities (ex. conduct Youth Participatory Action Research) and class events-as-routines (ex. Friday speakers and reflections). The syllabus, as one textual instantiation of planning, borrows from its textual forbearers as well as presents the events, activities, assessments, content, and outcomes of the course.



**ESSENTIAL QUESTIONS:**

**What are the important issues in my community?**
**Who has power and how do we access it?**
**How can we effect change?**
**How impactful have the youth been in impacting lasting change?**

**Students will know...**

- SWBAT define the following terms: identity, Maslow's hierarchy of needs, social construction, intersectionality, heteronormativity, heterosexism, homophobia, hegemony, privilege, dominant, marginalized, black feminism (womanism), gender and sexuality spectrums, white privilege, underrepresented groups, colorblindness, assimilation, deficit-model thinking, asset-based thinking, counter-narrative, micro-aggression, patriarchy, white guilt, disaster capitalism, oppression, ACES +more
- SWBAT define and distinguish between dominance, collusion, resistance, and agency; structural, internalized, individual, active, and passive racism; sex and gender; race and ethnicity; equity and equality

**Students will understand...**

...that some benefit from unearned privilege and some are systematically disadvantaged
...that we are all affected by -isms
...that oppression damages the oppressed and the oppressor
...that the purpose of education is to transform, not replicate society

**Students will be able to...**

- reflect thoughtfully on their own overlapping identities and oppressions how those identities impact the way they see and are seen
- conduct Youth Participatory Action Research and analyze/use data to support their claims and recommendations
- collectively and individually deliver a prepared, formal presentation summarizing their research to an authentic audience for the purpose of proposing real change

**Important components of this course:**

Friday Speakers-note taking, asking questions, active listening, participation, attendance
Reflections-2 pages, typed, single spaced
Projects-collaborative, engaged participation, creative thinking, follow through
Active Learning-full participation, good attendance, critical thinking

"WHEN I DARE TO BE POWERFUL, TO USE MY STRENGTH IN THE SERVICE OF MY VISION, THEN IT BECOMES LESS AND LESS IMPORTANT WHETHER I AM AFRAID."
-AUDRE LORDE

**Figure 5.5: Eliette's course syllabus**

The syllabus also presented multiple opportunities for the class to be responsive to students' choices and interests. This starts with the first essential question, "what are the important issues in my community," which is written in the first-person voice as a question that a student could ask themselves, and includes the question "how can we effect change?" which positions change as a collective endeavor. Each of the objectives in the section "students will be

able to" involve students entering with whoever they are at the time and presents choices for them to make within the class. When we consider the roles that documents play in the multiple trajectories that inform teachers' planning processes, we must consider them as tools that provide both structure and responsiveness.

Planning is a long-term endeavor, not a blank slate exercise. As can be seen in the multiple situations with and around texts that Eliette, her students, and her colleagues participated in highlights a multi-year trajectory of socially organized, historically situated practices.

Establishing a classroom context responsive to students. When I talked with Eliette in August, she was looking forward to teaching the class in both fall and spring semesters. However, she was going to be out on maternity leave starting the end of September. Her leave affected her planning for the course as she thought of multiple implications for her students, especially as she planned for how content would be responsive to their interests and questions. She said, "it's like, figuring out this balance of how much of it is mine, and how much of it is theirs." Two texts, the course syllabus and a survey she intended to give on the first day of school, mediated this tension Eliette felt between structure and responsiveness to her students. Through both, she looked to combine opportunities for meaningful student choice with the existing 'givens' of the class.

> It's a weird start. I just have to know that this is a marathon, not a sprint, and like -- this first year will be interesting. An interesting effort.

In framing her intentions and available resources in light of her students' potential needs, Eliette oriented to the year as a longer-term endeavor. This stance helped her orient towards her students' needs and her own resources and make choices about what she would plan for them.

To learn about her students' interests as soon as possible, Eliette made a survey for them to fill out on the first day (Figure 5.6). The survey had two opening questions that asked students why they had signed up for the class and what they hoped to get out of this class. It then presented a set of 20 issues. Students could rank each issue on a scale from "not so important to me right now" to "this is VERY important to me." Eliette phrased these choices "so the kids felt okay with saying 'it's important, but just not to me right now.'" She anticipated that her students might not be interested in everything and gave them an intentional 'out' for not engaging with every single thing on the list while still framing it in a way that valued the topic. Eliette planned to take the students' answers and condense them into a pie chart and share the answers back out with the class to "make some decisions" and that the results would "give us a way to focus." The final question of the survey asked students "what else would you like me to consider as we begin this class" and prompted for beyond the content already brought up, the way the class would work, or individual learning styles. Built into the way the first day of school works, Eliette designed a textual mediator that enabled her to make decisions that were in response to the specific students she would be teaching. She anticipated herself *and* her students as audience of the survey results, which became a classroom scene that would inform future ones. This survey gave Eliette a way to start fulfilling her goal of making content responsive to students.

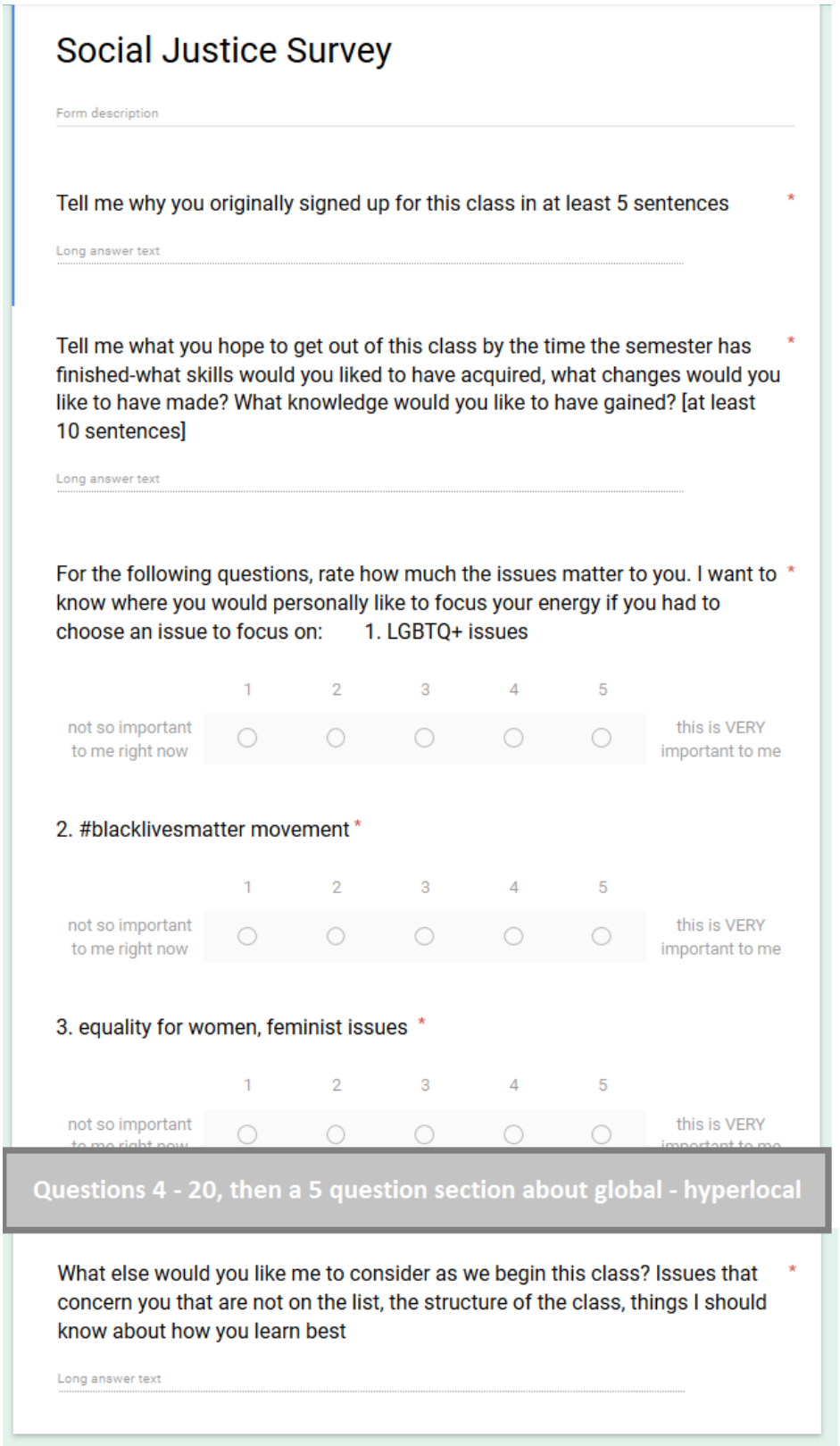



**Figure 5.6: Screenshot of Eliette's survey**

Multiple times in the course of our conversation, Eliette foregrounded the role of time as a planning variable. Like Amelia, Eliette was interested in intentionally building community at the beginning of the year. Based on an interaction with a student the year before where students were handing out papers and said they didn't know who other kids in the class were, "And I was like, "Oh my god, that's my fault." That whole year… I can't have that." She went on to explain how important community building was to the course:

> The first couple of weeks I want to spend a lot of time community building. So that people know each other's names, and we're breaking down some of those walls, and building trust, and building relationships. And working in groups… whatever I can do to get them to form a community.

She also intended to do activities where students would be up and moving, "it being the last period of the day." Looking ahead to second semester, she marked senioritis, the term for seniors becoming less motivated as they reached the end of the year, "hopefully if they're interested in what -- if they care about what they're learning, then they'll be propelled to care about it." Each of these instances places student activity in relation with time, and Eliette planned with her knowledge of time for student activity.

Like Cora, Eliette was attuned to making content accessible to students and the aims of the course. She said, "the content, I feel like needs to be fresh. And I have content in reserve…and I've been saving articles on Facebook, so that I have a lot of resources." She used digital tools to mediate classroom content and emphasized the role that digital platforms and choice would have:

> I think I'll use Blendspace, and start categorizing some of the articles I've archived, along these -- along these categories [of the survey she created]. And I'll put all the Blendspaces up on Google Classroom, so that they can be like,

"Today, I want to look at environmental issues."

Eliette's desire to fulfill her goals of student voice, choice, technology did conflict, however, with her goals. She evaluated the Blendspace platform negatively when she said,

> The only thing about Blendspace is that they can't add an article themselves. It's only teacher-access… So if I'm trying to run a democratic classroom, I don't want to be the main author, you know?

As Eliette considered the ways that students would engage with the content in her class, she opened up opportunities to be responsive to their interests and needs. Planning for the vehicles of student voice, however, she found the technological tool limiting.

Thinking about routines with digital resources, Eliette also looked to establish responsive routines in her classroom. The digital resources helped her to consider the weekly schedule and shape students' activities with them; for example, she said, "I'm hoping that Monday we'll spend cultivating or harvesting a story – like an article that they'll either present or share out, or discuss in a group." She surmised that Tuesday might be a teacher-led lesson and then Wednesday "is a shorter day for us, because we have PLC in the morning, so maybe Wednesdays we just jump right into -- like Socratic seminar, or current events share out." She revisited her goals as she finished mapping out the week: "But I think at some point there will be projects the kids are working on. So then Thursday and Friday become project days." This brought Eliette to talk about the tension between structure and responsiveness, based on her past experiences, and spatial orienting:

> I feel like I need to lock them into a structure while I'm gone. And then I also feel like, from my past experiences of doing student-led curriculum, that if you don't have student leaders, it doesn't go anywhere. A few kids who go work on their work, will do it, and the other kid will loaf around, and it just becomes a shitty

> environment. So, I don't want that to happen. I feel like I need to keep them moving, so we don't get lost.

Like Kirra and Cora, Eliette also considered the structural 'givens' that she would want to plan to establish, avoiding scenes she didn't want to happen, and envisioning what would be ideal.

**Taking into account the rhythms, emotions, and needs of real humans.** In my conversation with Eliette in November, she described the ways that she had set up her long-term substitute teacher to take over the class. This included how she had mapped out a calendar of speakers for Fridays, how she had set her up with three weeks of plans, asked the sub to use the scripted AVID curriculum, and planned for her to meet with the English department for Freshman class. The distributed nature of planning for not being there included materials, conversations, and situations, as well as reaching her via text, setting her up with her email, and attending parent's night. Distributing her maternity leave planning through multiple audiences, conditions, and texts, Eliette planned not only for her absence, but also for her return.

I asked Eliette how she was planning to return to the classroom. Anticipating this transition was filled with anxiety. Her response started with her network of people she turned to then identified the scenes of her return, what was in place for her return and, most importantly, how she was planning for herself.

> I'm starting to have anxiety about it for sure. …
>
> Because my other friend at [the other city high school], I texted her and asked her a question. She's like, 'we can't do that right now. I'm drowning.' And so it gives me a lot of anxiety because I remember that feeling so well and I'm not drowning right now because I've had five months off. {laughs} I've had like the relaxation of summer. I did like the crazy planning and prep for the first three weeks.

Eliette, in reaching out to a colleague, was re-situating herself, only to be reminded of the rhythms of planning. With summer break and maternity leave combined, she had five months

off, excepting the three weeks of teaching and planning at the beginning of school, but she described how she attempted to ease her anxiety.

> And so my first way of planning for it is thinking about clothes that are going to get me through the day. Then thinking about the anxiety of the job. And I've been doing this 14 years. And I've gone back off of maternity leave twice before. And survived each of them. but and this time should be easier than all the others because I don't have an hour-long commute and I can see her in the middle of the day to nurse her if I needed to. but I don't know if I'm like being in my 30s I'm more like righteous about it and mad because I don't know where I'm going to pump.

A mother, re-entering the institutional context, Eliette anchored herself in immediate personal experiences of motherhood. Her anxiety leads her to turn to past experiences, which she has made it through, as she anticipates how she's going to make it through the future of going back to school.

> Or, I'm thinking about that Monday going back. And I can only think about that Monday. I can't even think about that Tuesday. And I think I have a lesson plan ready because it's the Race Panel. So I just have to take them to listen to panelists speak. But that's only for one class. What do I do for AVID? and what do I do for English? or I mean, social justice? Or maybe I just

"fuck it"

> and take them to the Race Panel all day long and I just say, you know, I'm in leggings and an oversize shirt, like I said

"We're going to the Race Panel and I'm
going to need this work from you."

> Because I think this year more than anything I feel like a sense of self-protection, self-care, bringing my expectations down to where it's manageable for me. Because, I don't know, I feel closer to quitting than I ever have. Even though you hear me talk about it. You know I love it. I feel closer than ever to quitting, just walking away from it. It's so crazy. Like our job is so important and so crazy all at the same time.

In this moment, Eliette spoke to an often-overlooked dimension of planning: the affective dimension. Needs, emotions, and feelings – of teachers' and of their students' – guide how teachers orient themselves and envision possible futures with students. To mitigate her anxiety about returning, Eliette scaled down her planning to a specific day – the Monday she would return – and envisioned only what would happen that day. She focused on events at school, on a possible comfortable outfit, and even language she would use to frame the day with her students. This concrete scene-making helped ground her and make what she was planning for responsive to her needs as a person as well as a teacher.

Eliette's planning practices were responsive to her context, her students, and herself. She was deeply engaged in the trajectory of course creation, participating in long-term planning fundamentally shaped how she planned to enter (and carry out) the school year. She assembled this history of planning in relation to the students she would see on the first day, and designed an online survey to get to know her specific students better than she did. Her students, and their needs as Juniors and Seniors in high school, played into how she was framing them, but she relied on needing to know more about what they wanted and needed. She planned with what she did know: the social justice class, her beliefs and experiences, her connections to the local community, routines that she wanted to put in – but she couldn't plan more without knowing her students.

As Amelia and Eliette planned for the class, they marshalled digital and physical resources to enable their own work and the work of students. They created and referenced texts that would help themselves plan (ex. Amelia's physical plan books), Both found meaningful connections to this course and sought to find ways for students to find it meaningful to themselves. To that goal, they created spaces for students to read themselves into it.

Planning is a responsive practice. The many possibilities that Cora, Amelia, and Eliette put forward as their plans were always in relation – and in response - to the many contexts at play. There was the district-wide context that informed the structure of their courses, school-based context that Eliette navigated, and the community (and national) context of immigration that Cora explicitly dealt with. In the context of the beginning of the school year, they were all planning specifically for building community in the classroom as well as establishing practices that would be responsive to the specific students they had. Furthermore, these teachers' planning was inherently in response to themselves – their own ways of working with texts and their past histories and what they needed to enter the classroom. These specific examples of responsiveness demonstrate just a portion of the many contexts at play. They illuminate the multiple scales and scopes that teachers are taking into account when they plan, navigating and negotiating those that enable them to be responsive to themselves and their students.

The interviews that informed the findings in Chapters 4 and 5 contributed to a nuanced understanding of how teachers situated themselves in relation to their contexts. Their reflections, explanations, and descriptions (of intended instruction, past experiences, and planning and teaching artifacts) enabled a set of insights into their framing, reasoning, and intentions. In Chapter 6, I am informed by these interviews as I work with a data set situated in the active processes of planning (collaborative planning meetings and recorded screencasts).

# CHAPTER 6

## WHAT TEACHERS DO WHEN THEY PLAN

In this chapter, I propose a model of teacher planning that illuminates the complex mental, material, and contextual work that teachers do when they plan. My central premise is that teachers, based on goals and givens, compose texts and talk for intended use in future instructional contexts. This finding can be broken down into three core practices – orient, invent, and envision – which teachers leverage in the course of their planning.

I developed this model (see Figure 6.1) in an iterative process that looked at the data included in Chapters 4 and 5 as well as data from two trajectories of situated planning that I present in this chapter. The first trajectory is from Russell, the high school English teacher introduced in Chapter 4, who described his district's curriculum as traditional, but sought to incorporate more project based learning opportunities using his and students' websites. The second data set involved Jessica, a middle school instructional coach, and Elle, a middle grades English as a Second Language teacher, who worked together to create a unit for one of Elle's classes. The real-time nature of these situated planning examples enabled me to consider planning-in-action. Because this activity was less removed and reflective than the participant interviews, I was able to attend closely to patterns of activity as they unfolded.

The structure of this chapter is as follows: I first define what I mean by orienting, inventing, and envisioning and provide illustrative examples of each in planning situations. Because they inherently inform each other, I present data that shows multiple examples of how they interact and intertwine in the course of planning. I close by explaining what attending to these three dynamics can help us see about teachers' planning practices.

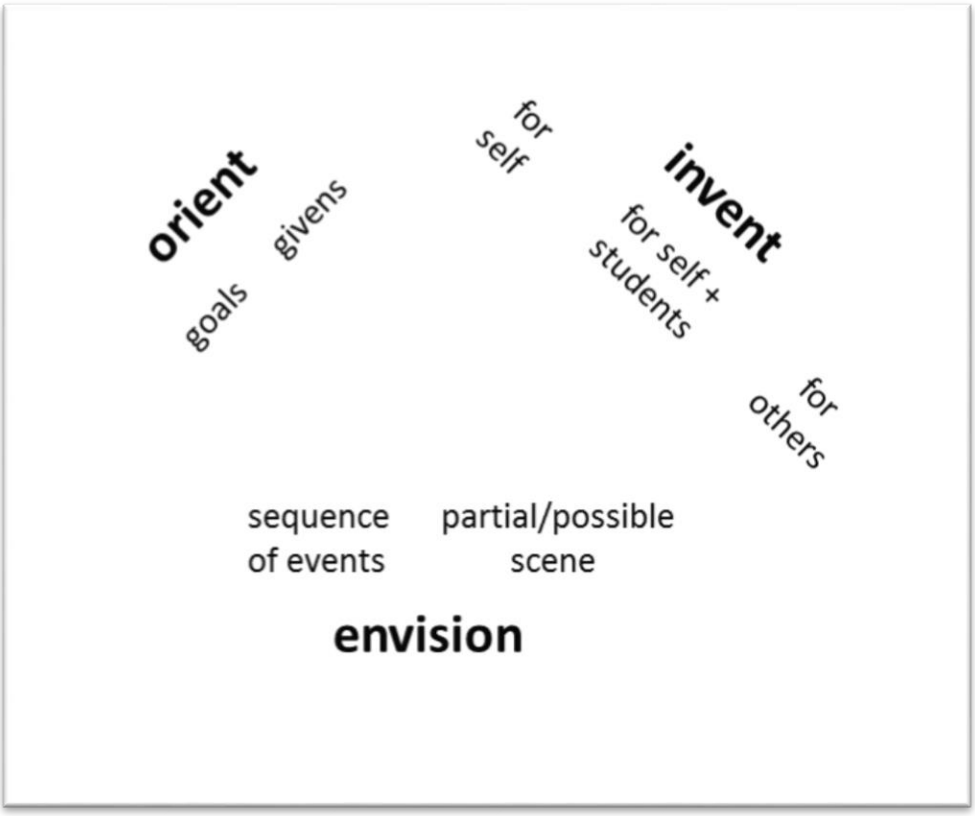



**Figure 6.1 Model of teacher planning practices**

## Orient, Invent, and Envision

As teachers plan, they take into account what's available and pertinent (orient), create for an anticipated future (invent) and play out possible futures (envision). Using the practices as lenses, we can more thoughtfully look at how teachers plan for instruction. Each of these three practices can be a starting place – this is not a fixed or 'right' order - and they fundamentally inform each other. As planning is dynamic, has multiple scales and scopes, and happens over time, teachers also re-orient, re-invent, and re-envision, practices that enable them to be responsive to their classroom contexts.

### Orient

When teachers orient to their present context, they take stock of the situation they are planning for. Here, I focus on two features of orienting: goals and givens. Teachers articulate

goals—among them their own goals, their students' goals, or the school/department/district's goals. They may articulate the 'givens' of the situation they're planning for, for example how many students they have, what routines are in place, or what time of year it is. Givens might also include available resources, such as student work from when they did the same project two years before, a community member who could help them during a unit, or an upcoming event they might work into the plans. These goals and givens orient the teacher to what they are looking to do and why.

In previous chapters, there were multiple examples of teachers orienting to the features of their local context and their own experiences. Russell oriented to his goals of including more project based learning into his curriculum and Eliette oriented to her goals of making the curriculum work for her and her students. Cora consistently assessed the ever-changing givens of her situation. Kirra, Sahra, and Amelia all took advantage of available resources in their contexts, from teacher grants to other educators to community members as speakers. Across these examples, the teachers' orientations help them invent for and envision how things might play out in their classrooms.

**Orient to givens.** Teachers design from the givens that they have available to them in their planning context. When teachers orient to the givens of a context, they take stock of the pertinent features of the situation they are planning for. While the term 'givens' might appear static, givens are dependent on context and can (and often do) change. In the following examples, Jessica and Elle orient to Elle's given classroom context, and Russell outlines the givens of his departmental context.

***Jessica and Elle.*** When I sat down with Jessica and Elle in August, Elle described the primary features of the class that she was planning for. She noted that the students were mostly

in 8th grade (for schedule and social reasons, some 7th graders were included in the class period) and that this particular group of students had strong literacy skills. In addition, these students hadn't yet read a full-length novel in middle school. Based on these givens, Elle wanted to do a unit with the class where they all read the novel *The Giver.* Elle had chosen the core text, *The Giver*, because of the support – and challenge – it would provide the stronger 8th graders.

*(Re)orienting over time.* As contexts evolve, teachers take into account what could be available, or is no longer available. In August, without a class set of *The Giver* books, Jessica suggested that they could apply for a local teacher grant or, if it came down to it, the English department might be able to buy a class set. In addition to the copies in English, Elle wanted to support her students who had lower reading proficiency in English and get copies of the book that were translated into Spanish. Each time Elle and Jessica met, they updated each other on the progress of finding books in English and Spanish. For example, in October, Jessica and Elle couldn't find physical copies of *The Giver* in Spanish, but Jessica had found a PDF of the entire text in Spanish. When they met at the beginning of November, they considered making copies through the print shop, but were wary of how labor intensive and materially expensive that might be. Later in November, Elle was able to get the needed Spanish copies from the Spanish Language Arts teacher. This semester-long process of re-orienting to the needed materials is one example of the distributed (and sometimes frustrating) nature of planning. As a process of assembling resources over time, taking into account material considerations, Jessica and Elle's returning to the givens reflects one way in which teachers try to create possible futures for their students.

*Orienting within in the collaborative process of planning.* Each time that Jessica and Elle met, they oriented to the givens of that immediate situation, a process that helped them focus

their attention on the task at hand and coordinate their co-completion of it. This happened through multiple means, including linguistic and textual. One example of this was how Jessica and Elle started their planning meetings. When they sat down, both of them opened the Google Drive folder that they shared. This shared folder gave them a digital space that they used to store documents that they co-composed during their meetings. More specifically, in their second meeting, Jessica and Elle worked together to fill out a digital UbD template. Into their shared folder, Jessica had copied a filled-out UbD from her time teaching 6th grade. Explaining that they would use it as an example, to model what a UbD unit can look like, Jessica added that she had changed the format a little for hers and Elle's purposes. Revising the document for this context demonstrated how this document was intended to serve this specific situation.

***Russell.*** The givens of a planning situation are often affected by the school and departmental contexts within which teachers are teaching. In mid-October, Russell sent me a screencast of his planning for a mini-unit that would follow his unit on *The Crucible*, which he was then teaching. In the opening of his screencast, Russell described the school's junior year English class as "focused on a survey of American literature." He then described how the unit for *The Crucible* was situated in the context of the department (and the year):

> It is going to lead into what we call the 'Mini-persuasive essay.' In the past, this essay has been very highly scaffolded, with the teachers providing the research materials for the student and the students learning how to mine those resources for data and information. And then, in the second semester, the students will be responsible for finding the sources and completing all the research for the persuasive project that they end up doing.

This unit had givens associated with it, among them, what "we" call it, when it falls in the year, its complementary Spring unit, and the activity of both teachers and students within the unit (ex. first semester, teachers provide resources and students synthesize them). Having been taught

before, by all Junior year English teachers in the department, there are many features of this unit that are already established by the nature of the context within which it falls.

Experienced teachers often have materials they have made in the past that they're able to draw upon as resources in their planning. Russell had a Google Spreadsheet document that he used as a digital plan book. The document file name (see Figure 6.2) was 'Copy of E3 Unit 2 – The Crucible,' indicating that he had made a copy of last year's unit plan document, that this was English 3 (Junior Year), and that it was the second unit of the year, situating this document in Russell's practices, in his department's, and his school's practices. In the document, Russell used colors to differentiate what had happened the year before and what had already happened in the current year. In a screencast, navigating this document, he said,

> Those things that are in red is what the lesson plan was last year and what's in black is what I've done so far this year or how have changed it - so I can keep track of what I planned for this year but still use what I did last year as a foundation.

Russell's use of color visually indicated to him where he was in the unit and served as a practice that happened each year. He updated his document to reflect classroom events as well as school events (see October 19 'PSAT Today' as indicating an event pertinent to this year). Within each cell, which indicated a day's class period, Russell estimated time notations in parentheses and indicated classroom happenings then, using spacing to format, separated off anticipated homework. From his creation and naming of the document to his more specific use of color and notation, Russell's use of a past iteration of this unit plan provided him a sense of previous events and activities that he could orient to. This document, a resource for him and an example of distributed cognition, was in concert with his situated and distributed use of it.

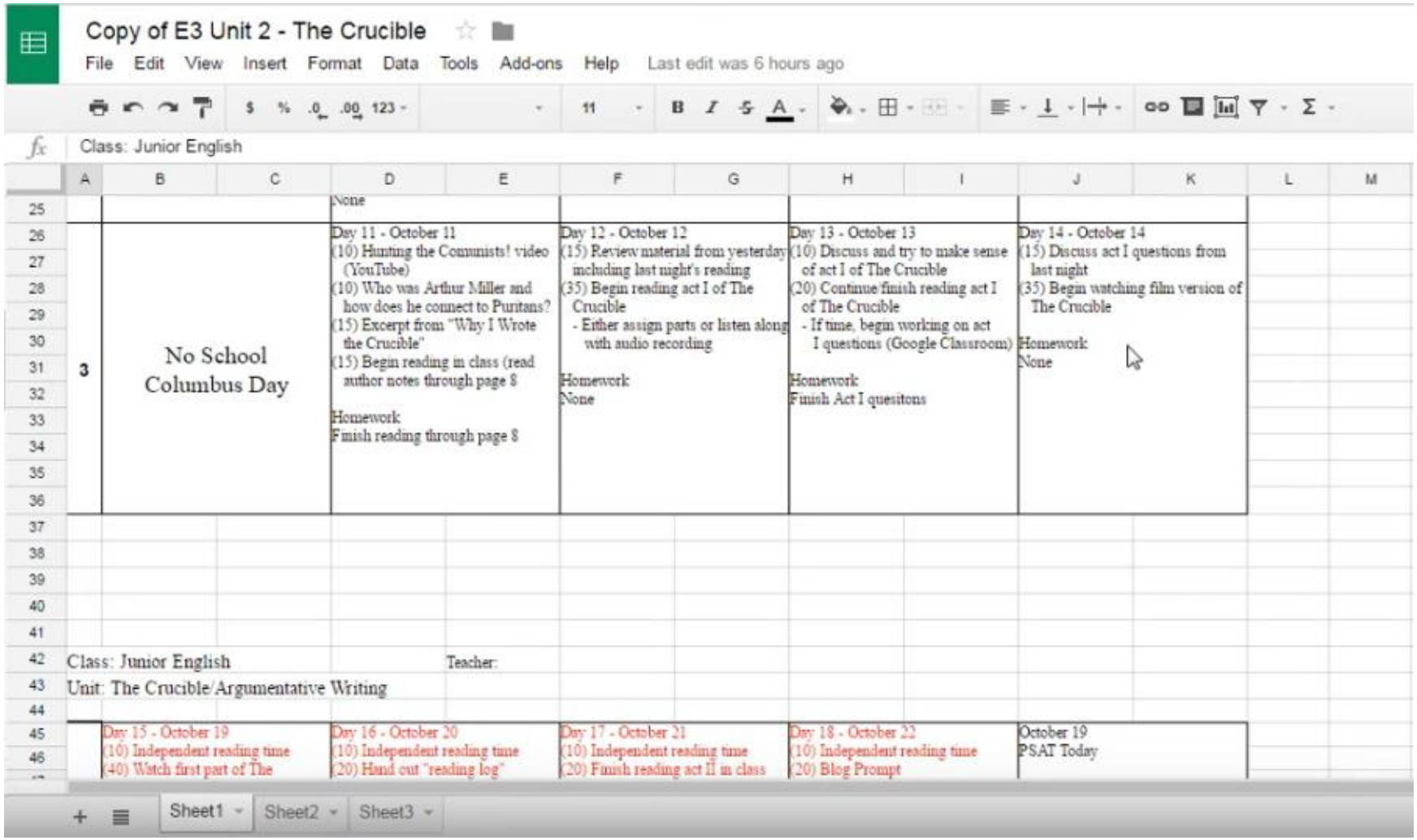



**Figure 6.2: Screenshot from Russell's screencast showing his unit plan book for *The Crucible***

Existing materials can provide a sort of template, one way of telling a story of how instruction went in the past, to use as a possible version of what could come. When Russell reviewed his unit plan for *The Crucible*, he scrolled down the document and narrated what he was thinking as he read, saying,

> So if I'm looking back over the next couple of weeks, it looks like I might have two more weeks of reading the play, plus a day for Socratic discussion over the events of the play, and then finally getting into the idea of a persuasive paper here [highlights text within cell], in early November, if I'm using this as any kind of blueprint.

To walk through the sequence of the unit, Russell noted chunks of time (two more weeks, a day) as well as major activities (Socratic discussion) and assessments (persuasive paper). These various anchors provided a "blueprint" for him to orient to – a possible sequence that he could follow as he plans for this year. Russell leveraged his past experiences and documentation to ground his planning, providing another example of how planning is inherently contextual.

Teachers design based on what they have available, both immaterially (memories, experiences, stories), and materially (accrued textual resources). Knowledge of the context plays an especially important role in orienting to the givens of a situation, as teachers are always planning for a specific context. These givens might change rapidly, and teachers must then re-orient to the current givens at hand. When they do, they can consider what they're prioritizing, what pressures and opportunities are in play, and what decisions have been made for them. Planning is contextual, and teachers must take stock of their context, including the distributed experiences and tools available to them.

**Orient to goals.** The practice of orienting offers teachers one starting place for planning. This is especially true when they have a goal that they want to plan for. When teachers orient to goals, they choose an intention that they would like to make happen. This intention might be

about themselves, their students, the more immediate future, or a distant future. In the examples below, Elle articulated an overarching goal she has for her students, and Russell positioned his goals in relation to those of his department.

***Elle and Jessica.*** A personal 'given' that teachers can work with is their own past experiences, which can shape the goals they make for their students (and themselves). During our first meeting, Elle described a transformative moment in high school that oriented her goals for the specific group of students she was working with. She said, "I remember vividly in high school, one of my best reading experiences - because I was not a good reader," was when a teacher gave each student in the class a copy of a specific book:

> I don't think we paid for the books - but somehow she ended up with a class copy of these books, and she gave them to us - she's like,
>
> "This is yours, put your name on it"

In this specific memory, Elle's teacher helped develop a relationship between ownership and becoming a reader. By making available the book, and the students' ownership of it, the teacher played an enabling role for Elle's sense of self as a reader. Elle talked about how the teacher supported her and her classmates in making meaningful annotations in their books, a practice that challenged their notions of what readers did with books – she said she had never written in a book before that experience. Elle recruited these two ideas of ownership and working with a book to shape the goal she wanted to attain for her own students:

> And I was thinking that the kids could own, not just say that they've read the book, but like *have* it, I thought would be so amazing. Because a lot of them don't have books at home and even just as a way to start that.

Here, Elle drew upon her own past to envision what she could make available to her students. The two parts of her goal – reading a book and having it too – bring her back to articulating the

givens of her real students, that many of them don't have the experience of owning many books (a pertinent feature of this situation). Elle oriented to a general scene of ownership and sense of self as a reader.

*(Re)orienting over time.* Goals can provide a reference point for planning. When I met with Elle and Jessica in October, Elle returned to her goal for reading a novel with her students, articulating her intentions more specifically than before, to build their reading skills and empower them for future situations. At the beginning of the conversation, Elle said she had reviewed the notes from the summer meeting and was currently "thinking about how to build [her students'] confidence in reading, write longer, text longer pieces, so that when they are at the high school next year with a lot less support and still required to do these things." Her goals were still focused on empowering her students to consider themselves as readers and having the skill set that bolstered that identity. She also drew upon her knowledge of what they would encounter the year after when they went to high school, including high school courses, offerings for ESL students, and the high school ESL teacher. Elle was orienting to time scales that extended beyond her time with her students – in this case she was thinking about a time more than a year away.

Sometimes, goals are instantiated in textual forms. As Jessica and Elle worked to fill out an Understanding by Design (UbD) unit template, Elle was trying to describe what she still wanted her students to be able to do in the long term. Jessica, as she said the words aloud, typed into the document "understanding the value of reading a longer piece of literature." Elle, seeing that the next section was about drawing connections, stepped back from the template and re-oriented to her goal for her students, saying:

> I just feel like a lot of the kids don't see themselves as readers in English. Like they can read in their own language, for the most

> part, well some of them can't, so I think that lack of identifying with reading, you know, with writing.

Without saying anything, Jessica typed in "Be able to see themselves as readers and writers." Elle exclaimed "Yea! Yea! Thank you for translating." Co-authoring happened in multiple ways in this situation, and the result was constructed through verbal language and textual inscription. In this instance, planning was not about filling out templates, but instead using the template to enable Elle to articulate her goals in one way. Planning, not a practice that happens simply in a teachers' head, is instead instantiated in multiple situations over time.

***Russell.*** There are often multiple goals at play when teachers plan, and they must negotiate their own goals with those affecting their context. As Russell carried on his screencast planning for *The Crucible*, he articulated the multiple goals for the situation that he intended to fulfill. He said:

> I am grappling with how to make this a project-based, or at least influenced by those same concepts of project based learning, while still sort of accomplishing the goals of a persuasive writing unit, and also using *The Crucible* as a launch pad.

His own goal of more project-based learning, combined with the goals of the persuasive writing unit which were established by his department, needed to both be accomplished with the given of instruction taking place with *The Crucible*. Russell continued to clarify what he saw as two main goals of the project that he found important:

> One, that it's an authentic project, that they're learning the skill of persuasion and argument, but I want them to do is learn those skills for the purposes of authentic persuasion. This is a real-world issue. Second, part of it is that it's public. A component of their project has to be that they're sharing their work with a community in some way, shape, or form.

These two goals build on the unit goals of persuasion and argument "for the purposes of authentic persuasion" and "sharing their work." Both of these decisions are oriented to Russell

opening up opportunities for more authentic learning opportunities. By making the rules, the givens, of the assignment, Russell was starting to plan a project that successfully fulfilled multiple purposes.

Orienting is a core planning practice. When teachers orient to goals and givens, they act as a nexus of their intentions and the intentions of their context. As many researchers have found, teachers make decisions, determine goals, and align their instruction to their beliefs (McCutcheon, 1992; Parker & McDaniel, 1992; Smagorinsky, Rhym, & Moore, 2013). With that said, orienting is also fundamentally distributed – instantiated in what teachers have made (ex. plan book, previous unit plans), the materials they're given to work with (ex. *The Crucible*, already-created unit assessments), and the materials they use as vehicles for thinking (ex. UbD template). Attending to both the mental *and* material work of orienting enables us to see what teachers are designing when they engage in the creative work of inventing and envisioning possible futures. Inherently tied to context, orienting also enables us to see how planning cannot happen in the abstract. As teachers orient to their present context, they determine what inventions are necessary to fulfill the multiple goals at play in the context.

**Invent**

Inventing, or creating for an anticipated future, is an essential vehicle for planning. Teachers invent for multiple audiences – for themselves, for themselves in configurations with students, and for other people. These categories, while focusing on the teacher-as-inventor, are often informed by collaborative invention (as will be foregrounded in the case of Jessica and Elle in this chapter). At times, invention results in texts (a collection of past unit plans) and other times in less material products (a routine for starting the class period). Often, something teachers invent for themselves (ex. notes in a plan book) informs texts for students (ex. daily agenda on

the board). Invention accrues over time, building on past experiences and available resources. And, invention enables future iterations of planning. While the products of invention change, teachers' planning practices involve multi-faceted, multi-purposed, and multi-audience trajectories of creation.

Inventing might sometimes be the first step that teachers take when they plan – it is presented here as a second step for bridging the other two practices, not because it always proceeds from orient and leads to envision.

In Chapters Four and Five, invention took multiple forms and was instantiated through texts, configurations, and routines over time. Texts included the plan books that Russell and Amelia kept for themselves and the digital artifacts (website and Google Slides presentation) that were created to mediate interactions with students. Configurations included Cora's assessments of what groupings her students needed (and which ones wouldn't work for various reasons). Routines were something that Eliette was intent on creating in order to provide structure to her class. In the data presented here, I explore how Russell, Jessica, and Elle invented for themselves and for configurations with their students.

**Create for self.** As teachers plan, they create a variety of documents, speech, and routines they intend use. These might be notes in a personal notebook, questions jotted on a sticky note, a binder of materials for a unit, or even an audio recording capturing an idea to develop later. Routines might include sitting down on a Sunday evening to plan the week ahead, or collaborating with a professional learning community on Wednesday mornings. Teachers leverage many situated opportunities as they invent. Here, I highlight Elle's creation of an Understanding by Design (UbD) planning template with Jessica, and then turn to Russell's commentary as he brainstormed a project while composing a Google Doc.

***Jessica and Elle.*** As mentioned, Jessica and Elle filled out much of the UbD template. Doing so involved leveraging an old UbD plan for its language and structure, clarifying their intentions and student activities, and articulating what texts and configurations they would need to accomplish the unit goals. At the end of the meeting, Elle commented that she found the work valuable, saying,

> Well, to be honest, like I don't have like these for ESL. Like it's a content that only I do - no one else does it [in this building]. I think everybody who's ever been in this position does it their [own] way.

Because Elle was often left to her own curricular devices ("content that only I do") she did not commonly participate in the collaborative practice of filling out UbDs (at this school, an activity that often happened with an instructional coach). Elle added that she and a former colleague did document their planning one year by using one Excel spreadsheet, but she contrasted that experience with the recently-created UbD, saying, "I just feel, like, focused." Filling out the UbD template, a document that only is for her own planning practices, enabled Elle to feel like she articulated the features of the unit with more clarity.

***Russell***. Creating documents for themselves, experienced teachers can revise documents they've made themselves before. When Russell began his screencast, he verbally oriented to the class (Junior year English, mini-persuasive essay) and articulated his goals (making the project authentic and publicly distributed). He then opened up a blank Google Doc (see Figure 6.3). First, he typed out the heading, which read "Thoughts on my PBL, Crucible/Persuasive "Essay" unit." This heading textually iterated the givens and priorities of the document. He then typed up his two goals, which he re-verbalized as he did so. After those two, he added, "and then of course, it has to teach the fundamental skills of research and persuasion." This last goal is one framed by his department.

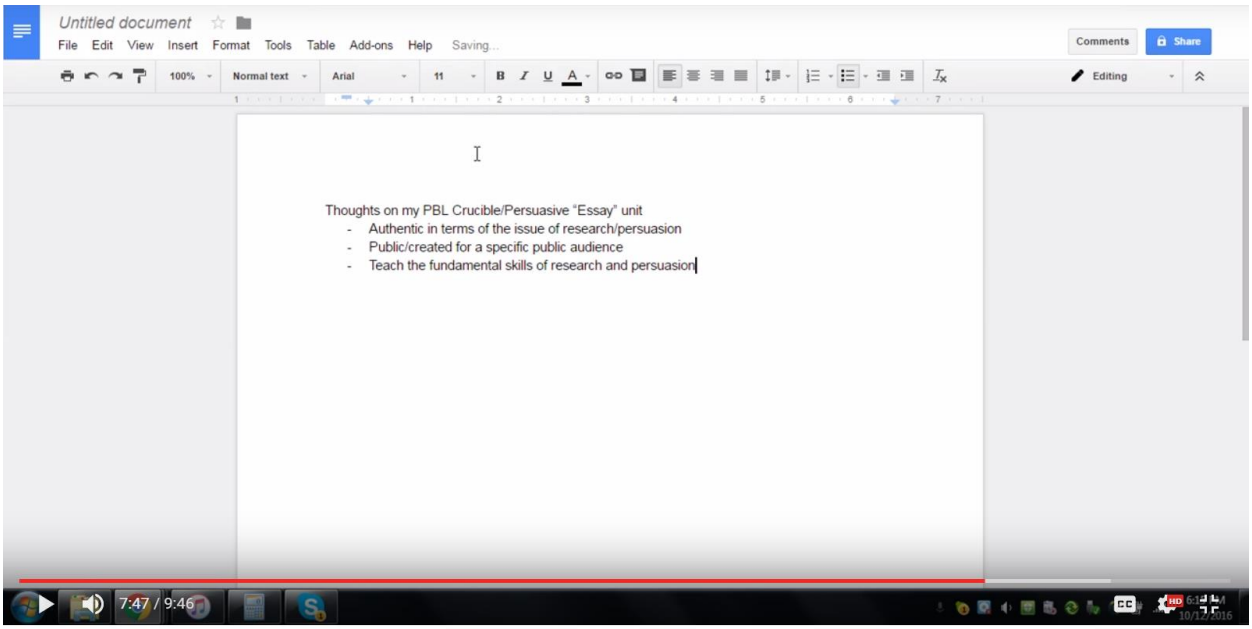



**Figure 6.3: Russell typing out his goals as he starts to brainstorm**

In the course of his composing this document, Russell assembled resources from his past experiences. One of them was something he had learned from Cora during the previous summer at the local National Writing Project institute. Cora had led a teaching demonstration on a museum gallery project using QR codes, which she used to engage people in the school community with her students' projects. As Russell remembered this idea, he typed "Museum Gallery (QR Codes)" and said, "I really like that idea. I think [types "->" and types/says "let's go with this"] I really like it as an opportunity get different people in the school community as part of the conversation and create multiple perspectives as to what's going on." Russell drew upon this memory of a rough architecture for a student project. Cora's story acted as a resource for his current invention, demonstrating one way that invention can meaningfully be impacted by past experiences.

A second resource that Russell drew into relation was the Buck Institute of Education's website, of which he said, "I go to regularly, at least to sort to galvanize my project based learning roots." He opened the website and navigated to a few different pages, evaluating some

of the helpful and less-helpful features that they offered. He found the "Driving Question Rubric" (see Figure 6.4). He scrolled down to the chart of sentence starters and said that while he didn't find the directive to put the questions on a paper towel roll, that he *did* like to ask, "how can I use these terms?" He then started verbally composing a driving question while hovering his mouse over certain words (and sometimes highlighting them). He said out loud, "How do we as, how about 'Should…' [highlights 'should'] this *is* taking a stance on a behavior… should we as… should our public role models… [tsk tsk going through column three, highlights 'make' [sings to self]." Using the visual as a template to verbally draft his question, Russell shows one way in which composing is distributed across resources, routines, and past experiences.

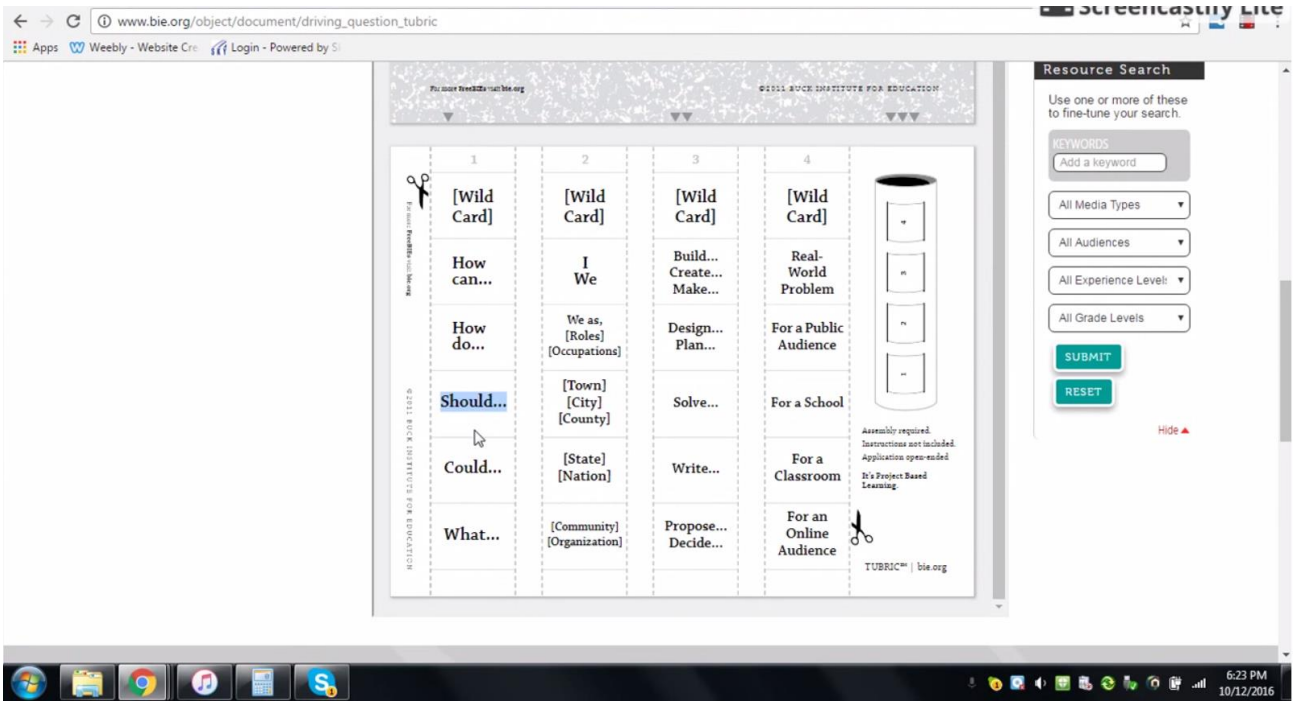



**Figure 6.4: Buck Institute of Education's Driving Question Rubric**

Russell then moved to inscribe the verbally-drafted question into the Google Doc where he typed (and said aloud) "Should our public figures (like athletes) [adds 'secular' without saying it aloud] or entertainers, take public stances on controversial issues" (see Figure 6.5).

Using the visual cues of the Driving Questions Rubric, Russell shaped his language for developing his unit's driving question. He composed it in this Google Doc that is meant for himself (with myself as researcher audience). The act of this invention was a vehicle for planning, as he tinkered with the language as he textually instantiated it. While this question is meant for a situation with Russell and his students (the instruction of the unit), this planning *situation and textual form* is for himself. It shows one way teachers recruit resources and experiences in the process of creation. Planning does not just happen in teachers' heads. To exemplify this division between texts for self and texts for students, Russell ended this part of the screencast by saying "now, the next step if the process is to turn this into an assignment that I can hand out to the kids!"

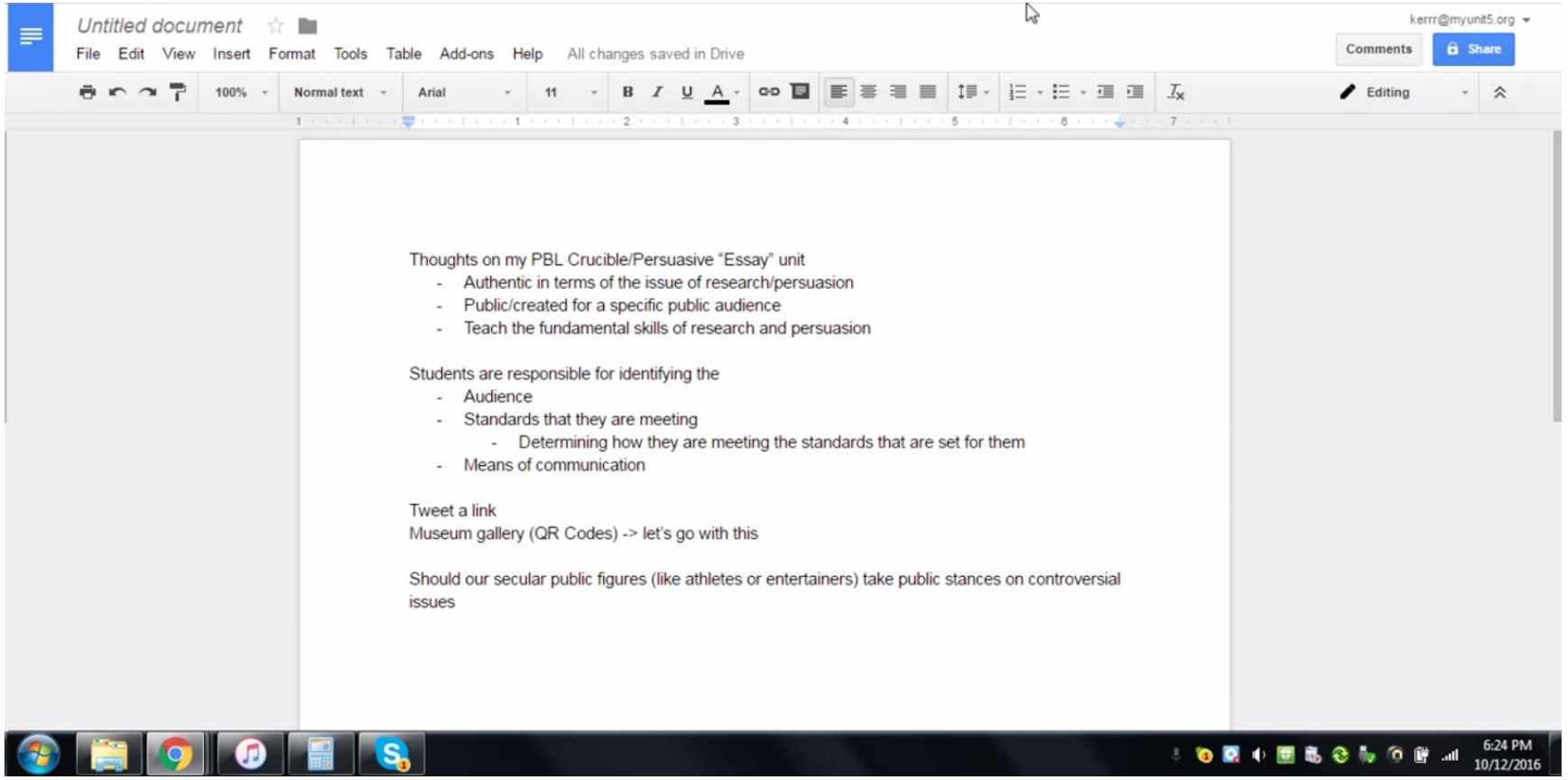



**Figure 6.5: Russell's brainstorming a mini-project within a Google Doc**

**Create for self and students.** To plan for classroom activity, teachers must create texts beyond ones meant for themselves. Consistently, teachers create for their situations with students. They may create essay prompts, graphic organizers, discussion questions, diagrams on the board, routines, group configurations, or any number of other things, but they create for scenes that will play out for themselves in relation to students. Here, I take a look at Jessica and Elle creating a rubric for students and Russell composing plan book entries and daily posts on his website.

***Jessica and Elle.*** In a meeting early in November, Jessica and Elle created a rubric for Elle's students to self-assess their understanding while reading a text. They spent time composing the rubric's language (ex. looking at language consistency across the rubric's four sections) and designing its visual features (ex. typographic formatting of key words). When they worked on the wording, they based it on language from an existing metacognitive rubric language that they wanted to make "kid friendly" (see Figure 6.6). One way they did this was taking the existing language of the metacognitive rubric "through informal responses or annotations, student demonstrates" and changed it to "When I read, I show." Creating first-person language enabled Jessica and Elle to see the text as a tool for student use. Jessica and Elle also made formatting choices when composing the rubric, and discussed potential impact those choices might have. After they had agreed on the phrasing of each column's language, with attention to the modifier 'independently,' Jessica commented, "I always like to like highlight or bold or capitalize that key difference for [the students]. I feel like that helps them." Overall, the rubric creation process demonstrates one way that teachers read texts through their students' eyes as they invent them, a practice which affects what design choices they make. As Jessica commented mid-process, "a rubric is only as useful as for you and your students."

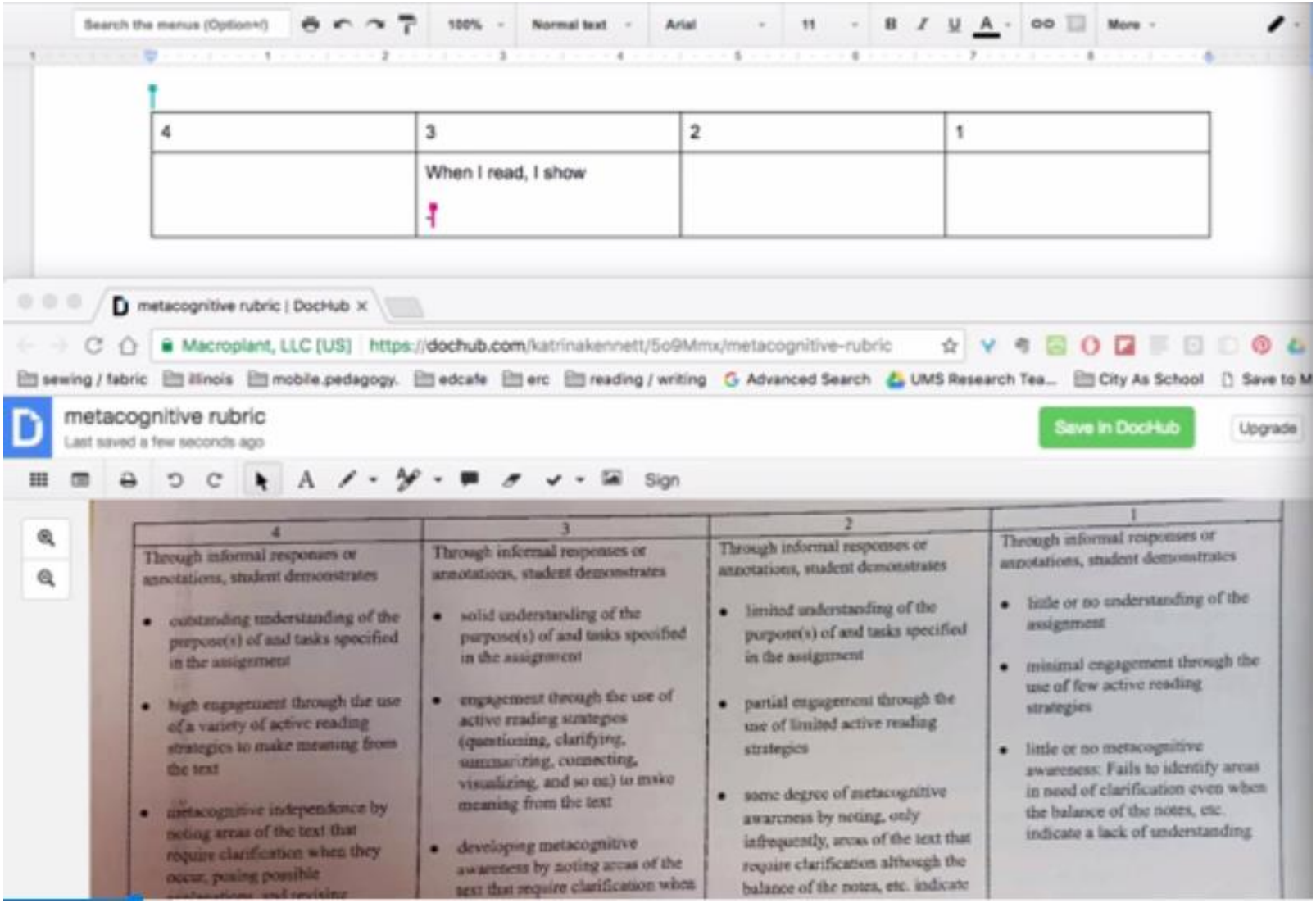
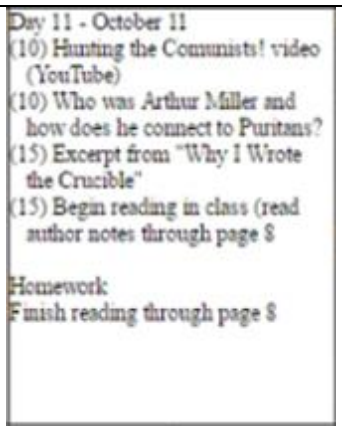



**Figure 6.6: Screenshot of my data collection during Jessica and Elle's rubric creation**

***Russell.*** Russell documented his planning in multiple texts that informed each other. Building from his digital plan book, Russell updated a daily agenda for use with students. He posted this agenda on the blog on his website. Russell wrote these blog posts the day before each class, recruiting the language and pacing of his previous year's unit plan. This process enabled him to anticipate upcoming scenes of classroom activity.

The language in Russell's plan book directly affected his daily blog posts for his classes (see Figure 6.7). At times, the plan book notations acted as shorthand for himself, as when Russell wrote for the October 11 class "Hunting the Communists! video (YouTube)" and then on the blog post just wrote "Hunting the Communists! video" and embedded the YouTube video within the blog post. He told me that he embedded the video in the post so that he could easily click 'play' at the appropriate time in the lesson. Often, Russell's plan book language captured the artifact, question, or indicated action, while the language of the blog posts almost always began with a verb (see October 11 with difference between 'Excerpt from…' and 'Read excerpts from....' These examples of Russell's inscription demonstrated how he changed a text for himself into a text intended for himself in a situation with students.



Day 11 - October 11
(10) Hunting the Communists! video (YouTube)
(10) Who was Arthur Miller and how does he connect to Puritans?
(15) Excerpt from "Why I Wrote the Crucible"
(15) Begin reading in class (read author notes through page 8

Homework:
Finish reading through page 8

# October 11

10/10/2016

0 Comments

Agenda:

1. Hunting the Communists! video
2. Review Arthur Miller biography slideshow
3. Read excerpts from "Why I Wrote *The Crucible*" from *The New Yorker*
4. Begin reading *The Crucible*
    1. This version of the play comes complete with textual notes from the author. It is as important that you read the actual ext of the play itself.
    2. Read "A Note on the Historical Accuracy of this Play" on page 2
    3. Read pages 3-8 (this is mostly author's notes)

Homework

- Finish reading up to page 8 if not completed in class



**Figure 6.7: Two screenshots from October 11 artifacts, one of Russell's plan book and one of his daily agenda blog post**

*(Re)invent for self and students over time***.** Invention, a practice that happens over time, is also responsive to its local context, both current and anticipated. As the fall went on, Russell described the evolution of his own blog / website. He said that he began to realize that organizationally, he needed to build separate pages for some unit projects. And, as the students created their pages and they moved through the units, Russell filled out the 'shell' pages that he had initially set up. Russell's own website evolved, with more links, details, and expanded pages, that aligned with the class activity. Reinvention, as a responsive practice, builds from its context.

**Create for others.** In addition to creating texts, talk, situations, routines, and more for themselves and for themselves and their students, teachers create for other people too. This creation includes lesson plans for substitutes or formal lesson plans for evaluation. While these situations are not detailed here, it's important to acknowledge, and an opportunity for further study.

What teachers invent for situations with students – including syllabi, rubrics, discussion questions, routines, etc. – is not often recognized as a planning practice. Yet, as we have seen here, when teachers create texts for use with students, the process of doing so can act as a vehicle for envisioning possible futures. As a practice, invention is creative, intellectual, and social work. It happens over time and builds from past experiences and available texts. It is responsive to intended audiences and can take many forms (material and non-material). It involves re-inventing through material and non-material means. What teachers created was consistently evaluated from students' perspectives of using it, or of an envisioned scene that the teacher saw it playing out in.

This framing of teacher invention as a vehicle for planning presents a counternarrative to the common notion that planning starts from a blank slate (or, a blank template). Traditional

notions of planning tie it to highly-structured textual genres like lesson plans (cf. Reiser & Mory, 1991; Sardo-Brown, 1990). Even arguments for teacher agency in curriculum making fail to mention any textual creation that teachers do (Paris, 1993). Thus, researchers need a new lens with which to investigate teacher creation, a pervasive and consistent practice in schools.

**Envision**

Planning, as anticipating future scenes and situations, involves teachers envisioning how their intentions and inventions might play out. This happens as a dynamic process, for example when a teacher plays out a scenario then changes one variable and then plays it out again. As teachers envision sequences of events, they rely on their knowledge of the context they are in and what the interaction between their roles and their students' roles might be. As they consider sequences or possible scenes, teachers often voice themselves and/or their students. Envisioning might be the first step that teachers take when they plan – it is presented here as third for how it builds on the explanations of the other two practices, not because it always follows them.

In Chapter Four, Sahra envisioned how her students would go through the diorama and Prezi project, and how they would put the projects in the hallway for others to interact with. Russell envisioned how he might present his website on Day One, and how the ideal situation of students taking ownership of it might play out. Kirra envisioned how she did not want 60 kindergarteners running around a field to learn about bees. In Chapter Five, when describing her anxiety about returning to school, Eliette said she could only envision just that Monday back, and what she was going to have to do to get herself through it. Considering roles, context, and possible futures, envisioning is a practice that enables teachers to evaluate the possible future available to them. It is a process fundamental to planning.

**Sequence.** Envisioning can sometimes take the form of outlining an order of events. Teachers may identify a series of steps that they need to complete so that students could have resources to begin a unit. They may narrate multiple steps that students need to accomplish in the course of a lesson or of a project. Regardless of scale, teachers envision sequences to evaluate their decisions and opportunities in the future. In the following examples, Elle explained how sequence of events in the upcoming school year shaped her decisions, and Russell mapped out how possible events in the next few days would affect how he would introduce the upcoming project.

***Jessica and Elle*.** Envisioning a sequence sometimes takes place on time scales that extend over months. At the end of a November 7 participant observation, I asked Elle when she expected to start the unit. Her response started, "I don't know." She went on to identify upcoming school-based events, such as vacations and grading periods, and remembered that student testing would disrupt the schedule.

> If we start after Thanksgiving, we're not going to be able to do it all before the break. And then we'll have break. And then, I feel like it'll really suck. Because it'll be like, we'll be back from break, and it'll be -- like I'd want to have it either happen and start in the first semester or second semester, so I feel like at this point, it might have to wait for second semester. But I think if there *would* be a good chunk of time -- oh, but then it's their testing time, too, in February.

Seeking an uninterrupted time period to teach the unit, Elle traced possible time slots along the contours of school breaks and semester grading deadlines. Thinking she had found an open time after the start of second semester, she started to envision doing the unit then, but remembered it would be interrupted by mandated standardized testing. Like Elle, as teachers anticipate what future opportunities they have, the distributed (across time, involving various activities) nature of their contexts affect what they have available.

***Russell.*** Envisioning a sequence might also rely on variables that play out only days apart, or even within a class period. In late October, Russell sent me another series of screencasts as he reached the end of the unit on *The Crucible*. Based on what the class had been doing, Russell wanted to set up a bridge from the unit to the mini-persuasive essay. He looked over his digital plan book and saw that his upcoming activities would allow him to fit in this project. He started with envisioning the most immediate upcoming scene – tomorrow's class.

> The next thing we're going to do tomorrow is pass out and discuss the project. Let's just call it the unit project here [deletes phrase from cell so it reads 'unit project']. That means that they'll have the rest of the class period to 'work on project.'

The events that Russell outlined - passing out the project, discussing the project, and working on the project – comprise the class period itself, and Russell updated the language of his plan book accordingly. Because of the first two events, he was able to leave the rest of the class period for project work time. Russell then chose the end point – being done on Tuesday – and worked backwards from that event:

> The thing that I have in mind is that they should be able to be done by Tuesday. I'm going to say Tuesday [types Project due on Tuesday (hopefully by the end of class], and then hopefully by the end of class, so a lot of that will have to do with then - I have to gauge their work and see how it goes. If they have 35min on Friday, I'll give them Monday as a class work period and we'll sort of see where they are by the end of the day on Monday to see if they need extra class time to polish off the project. So, we're going to leave that where it is for now, and that means I have to come up with what that project is.

The tentative nature of planning was foregrounded multiple times in Russell's think aloud. He selected Tuesday as the end date, though couched that choice more specifically by saying "hopefully by the end of class." He gave himself an opportunity to assess students' progress and be responsive to their needs based on multiple chunks of class time they would have. Notably,

Russell maps out this sequence of possible events as an initial step before he even creates the projects – this envisioning served as an orienting step to his invention.

**Scenes: Partial and Possible.** Envisioning can happen through setting up scenes of possibility. These scenes, composed by as little as one actor doing or saying something, provide a possible future that can then be evaluated. Scenes can describe the ideal (such as Amelia's hopes for students building community early on in the semester) or the not-ideal (as was the case with Kirra's story about not wanting 60 kindergarteners in a field learning about bees). Often, teachers voice themselves in scenes (as Amelia did when voicing how she would introduce the composition notebooks) and voice their students (like when Russell voiced how he would like his students to take up their websites as portfolios). Here, Jessica and Elle used partial and possible scenes to envision a specific resource that students could have available to them as they read, while Russell considered how a scene of assessment could change if he added QR codes.

***Jessica and Elle.*** During a meeting in early November, as they were considering what to focus on for their time together, Jessica asked if Elle had ever heard the term "fix it up strategies," which was something she had come across in one of her reading classes. She defined it, "like going back and re-reading or asking someone for help or looking up a word in the dictionary." She proceeded to envision what Elle might do:

> So, maybe if you came up with like a term like that that you could -- almost like you'd have like a bookmark with like the strategies on one side and like the fix it up strategies on the other side.

Jessica's suggestion that Elle create a bookmark produced a possible way that the situation could play out. Elle liked the idea and immediately said "Yeah! That'd be cool. And teach that first – yeah!" Elle's move to decide what to do first – an example of envisioning a sequence - more fully developed what kind of possible future might play out.

*(Re)envision over time.* In the course of envisioning a plan, possible futures become more developed as they accrue more detail. In some cases, the more fine-grained development can result in more use of voicing the 'actors' in the 'scene.' At the end of this same November planning session, Jessica and Elle returned to the idea of the bookmark. Jessica said, "the more you work with it, the more students will be able to say 'I think I'm here'" in reference to the levels of the bookmark. This ideal vision of students helped Elle re-orient to the goals of students as independent readers. She said, "Yeah. And measure themselves. Exactly. Yeah. That would be really nice because it goes back to that independence that we're trying to get at with you read by yourself." Elle envisioned her goal of students seeing themselves as readers as they're using the bookmark in a way to measure themselves and articulate their own growth. Jessica then proposed a scene where students *weren't* independent yet, and what Elle might say to students (including, within that scene, Elle's voicing of her students to them as an audience). Jessica said,

> Yeah. And if they really have no idea, you know, that would be when you say,
>
> "If you guys take a look at your bookmark and you were able to think,
>
> 'Oh, I could use that [strategy],'
>
> "Then that's when you're at a two. You just needed that reminder of, you know, this is something I can do."
>
> And those different strategies can be many lessons throughout. So, you have that structured time.

Jessica created a scene within which Elle is speaking to her students. In that scene, she voices Elle voicing the students' possible inner dialogue. In doing so, Jessica invokes Elle's goal of students seeing themselves as readers, when she says "this is something I can do." Jessica's voicing provides a possible scene for Elle. Using it, she could envision one way to support

students taking up the language – and concepts – of the bookmarks. Jessica broke from this 'scene' at the end of this excerpt. When she did so, she suggested that the strategies in the bookmark provide Elle a series of possible mini-lessons. If the bookmark becomes a 'given' of the classroom, Elle would have different opportunities for instruction. In this sense, scenes serve as a powerful vehicle for building sequences of possible futures that can evolve.

***Russell.*** To create the project that acted as a bridge between *The Crucible* and the mini-persuasive essay, Russell opened up a new Google Doc and titled it "English III *The Crucible: Final Project.*" He oriented the creation of this document by saying "they've already had their major unit assessment in the form of their Socratic Seminar. So, what we're looking at today is just something to bridge the gap and make to make it a little bit more interesting." Clearly a text intended for his students, he composed a two-paragraph introduction that framed the goals of the project, followed by the objectives statements and a section of bullet points that finish the sentence "your project should." As he was typing out these sections, Russell said: "This is all stuff I've been brainstorming in my head since the last time I recorded, these are the general ideas and now I have them down on paper." Translating his mental planning into textual forms enabled him to create a document for use with his students.

When he finished and was evaluating the document, Russell said: "this will be able to go on their website pretty well. I think I can still probably do the idea of the museum walk and sort of have it set up with QR codes." At this moment, with this partial scene of having a configuration of people doing a museum walk with QR codes, he had a moment of realization. He exclaimed "oooooo, yeah!" and tapped on desk and tsks-ed to himself for about five seconds. He then scrolled to the top of the document and changed the title (see Figure 6.8), saying, "instead of just calling it final project, call it Museum Gallery Exhibit. Hah!" He then scrolled to

the bottom of the document and added a bullet point to the bottom of the "your project should" section: "be designed to such a way that it could act as an exhibit at a museum." And said, "that way the kids can talk about … this will allow the students to curate their webpage to almost look like a museum exhibit." Russell's partial scene, of students doing a museum walk, caused him to visualize how their websites might play a role in the scene and affected how he changed the document. A mental and textual exercise, Russell was planning for an embodied scenario, motivated and mediated by texts. This is just one scene that happened throughout the creation of this document, but it shows how the scene acts as an evaluation of what has been created.

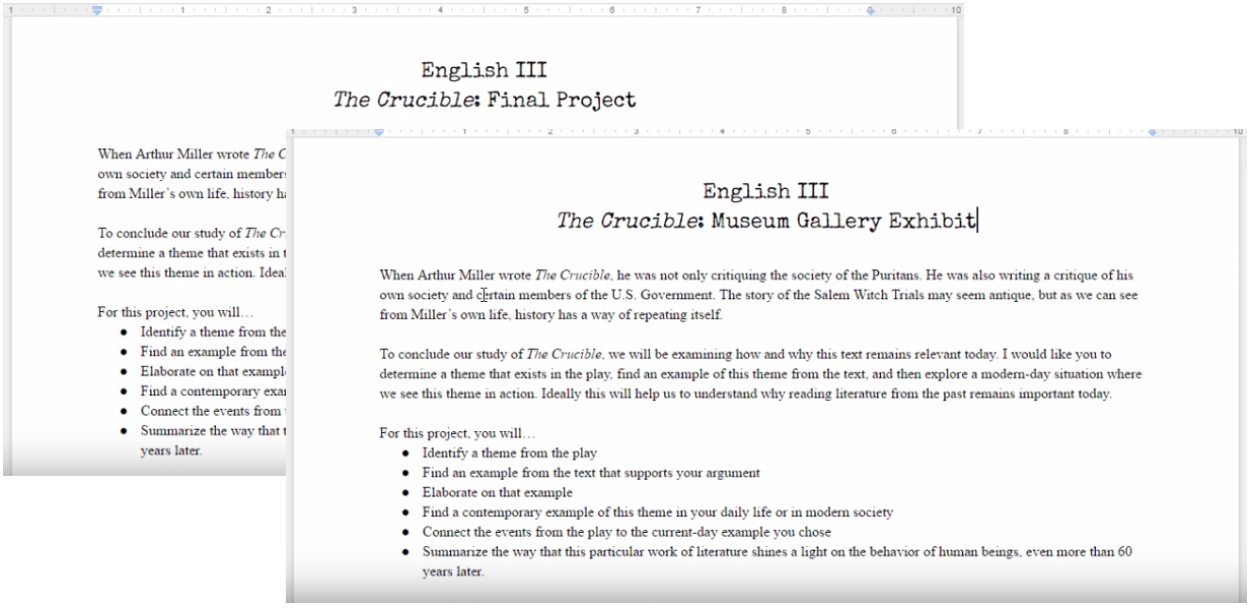



**Figure 6.8: Russell's unit sheet for *The Crucible* – before his incorporating QR Codes into the scene, and after**

When teachers envision possible futures, they give themselves an opportunity to play out possibilities with their projected future self and students. As primarily mental work, envisioning is inherently social – it involves others, either in its process and/or in what teachers are looking forward to. The mental work of it has been recognized as a form of planning as early as Tyler

(1949), who included sequencing activities as one part of planning. Wiggins and McTighe (1999) suggest selecting an end goal of desired learnings and work backwards to design instruction with those goals in mind. With that said, neither of these theorists has considered the multiple scales of sequence work that the teachers in this chapter have demonstrated in their situated planning practices. In addition, research on teacher planning has failed to recognize scene-based voicing as a vehicle for creating possible futures. Envisioning, as a practice has been recognized as a key element of invention (Schon, 1983), but teachers envisioning scenes with themselves and students has yet to be recognized as a conceptual and linguistic feature of teachers' planning practices.

All three core planning practices can be entry points, and all of them depend on the local context within which the teacher is planning. Teachers need the givens in order to design, goals to give purpose to their design work, modes of communication with which to invent with, and the creative work of imagining possible futures for themselves and their students.

## How Orienting, Inventing, and Envisioning Inform Each Other in the Course of Planning

Orienting, inventing, and envisioning are constantly informing each other in the course of teachers' situated planning practices. They happen over long periods of time, as well as over the period of time it might take in two turns in a conversation. To reflect the dynamic nature of this model, I added the prefix (re) in front of each word (see Figure 6.9). In this section, I select one part of a participant observation to trace how orienting, envisioning, and inventing played a role in Jessica and Elle's planning. I argue that by using this three-part model, we are able to better consider the co-constructed, multi-purposed, multi-mediated nature of planning.

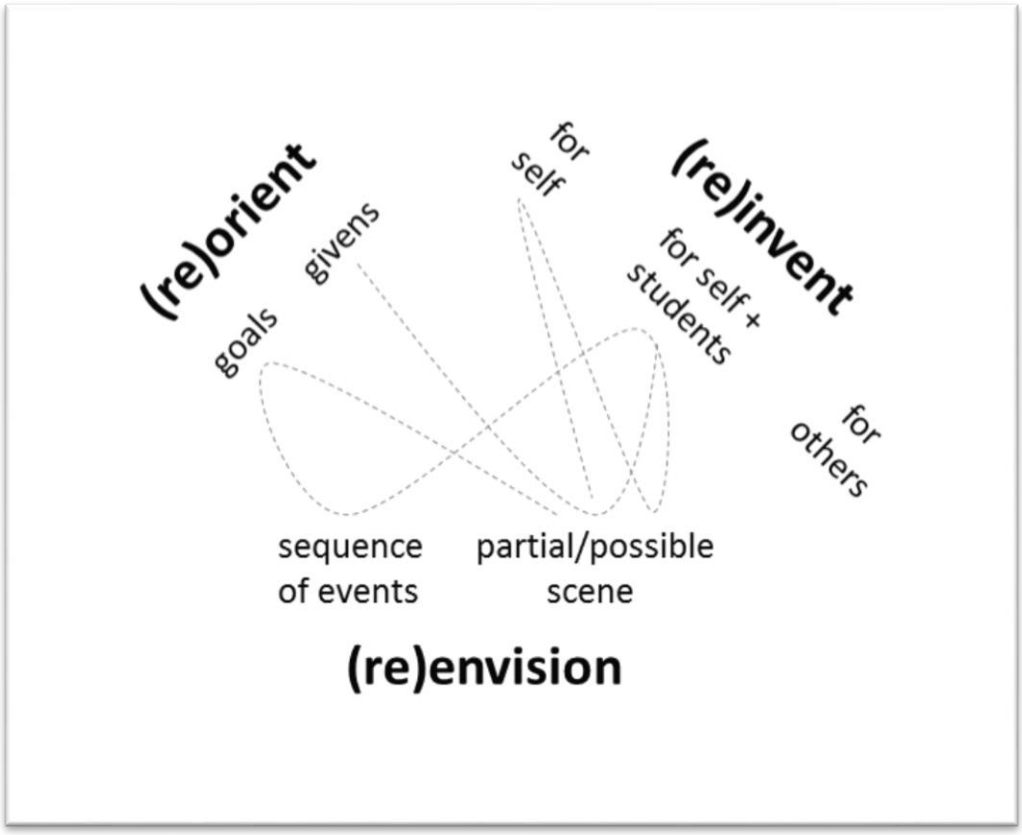



**Figure 6.9: Dynamic model demonstrating path of upcoming section**

**Jessica and Elle**

**Orient to Envision.** In the beginning of November, Jessica and Elle sat down to continue their planning for the unit on *The Giver*. After some small talk, Jessica oriented to the day's work by reminding Elle that two meetings ago, they had worked on the UbD template, and last time they met, "we took a step away from the UbD, and came up [with] that metacognitive rubric." She gave Elle a few different possible directions for what they could do that day, including going through the WIDA standards, talking about vocabulary, or, "We could talk about summative and crucial formative assessments, or we can move down to the bottom [of the UbD template], and

start thinking about actual day to day activities." The multiple pathways forward offered Elle a chance to choose the direction of the planning session.

Elle said that assessments might be a good way to start. She wanted to focus on how to assess students' self-reflection. Jessica asked, "What would be kind of your protocol for giving that assessment? Do you care if it's written or if it's spoken? Or, are you okay with either?"

Elle replied, "I'm okay with either" and then put out one possibility, saying, "I feel like I would probably read through it with them." Her scene became more tentative when she added, "maybe even having them self-evaluate." She went on to evaluate this as possibility, "I think for a good amount of them, they won't understand what it says yet. But I kind of feel like that's part of the process, so I think it would be ok." She then more confidently envisioned a sequence with students, saying "I would definitely read through it out loud, and we could go over it as they do what they have to do, and then, I'd probably -- after that -- like teach specific vocab out of there." As she envisions the introduction of this assessment, Elle gives her and her students different roles in the scene.

**Envision to Invent.** Jessica asked Elle if she wanted to do the pre-assessment with the first chapter of *The Giver*, or to do it before with a different text. This choice offered two available sequences. Elle said that she liked the idea of doing it with a different text, before *The Giver*, "like a short something that would be, even like picture-based." She carried on with one potential way she might do this with students, saying,

> Maybe have some options for like different levels of –
>
> 'Here, choose one of these books, read it,
> and evaluate.'

As Elle pictured the possible way she might give the pre-assessment, she slipped into what she might say to students. Her voiced instructions to students prompted her to think of what she would need to do to enable all of her students' ability to do it:

> I probably will make a Spanish copy of the rubric, so that those that are a little bit more comfortable reading Spanish can at least try and self-evaluate that way.

Elle evaluated that scene through the eyes of a specific population of students and, in doing so, gave herself something to create (a Spanish copy of the rubric). She would need this to enable those students to access the learning opportunity equitably with the other students.

**Envision to Orient.** Jessica returned to how Elle envisioned the assessment playing out with her students and re-focused on the scene in which it would occur, this time voicing it to make it more specific. She asked Elle,

> Are you just going to say,
>
> "Go ahead and read the book, and then fill this out?"

Jessica asked, that if this *was* the case, how would students demonstrate their thinking, and how their mode of doing so would affect Elle's ability to assess it. Elle replied,

> Now I'm trying to think through what that would look like… Because I feel like it would be -- I don't know, just what I'm thinking right now is like an interview. Like you know, just talking through it.

As Elle thought through this scene with students, she actively tried to envision the scene. Then used a genre (an interview) to frame the roles "just talking through it [with students]." This partial scene made her realize that some students might still struggle with their role in the interview, to reflect on themselves as readers. Elle evaluated the scene in light of these specific students (which feature as a given in how she's orienting to them).

> But I also know that there are some kids that won't necessarily be able to explain themselves, like I don't know how accurate I would get of actual reflection.

If students wouldn't be able to explain themselves, it would affect Elle's ability to assess their self-reflection. Since that is the goal she's orienting to, this scene wouldn't work in its current form.

**Orient to Envision.** Elle's mention of an interview prompted Jessica to fetch a book that she had recently read as part of her Master's coursework. The book included model literacy interviews, ones that Jessica said were often used "before [teachers] do guided reading groups" that she thought would be similar to what they were talking about. Drawing this new resource into their conversation, she opened the book and found the comprehension interviews that she was looking for. As Jessica narrated what she was skimming over, she interpreted what features Elle may or may not be interested in, providing a vehicle for a possible scene that Elle could take up with students

> It looks like you kind of ask -- you know, like have them read a little bit and say what has happened so far, and mark off the things that they take note of. And then, I wouldn't -- I mean, this would be if you did a running record; you wouldn't do that necessarily. It's got some of those things, like questions you could ask.

Using this possible assemblage of roles, materials, and coordination of both, Jessica 'read' Elle into the scene and marked her activity ("you kind of ask"… "have them read"… "mark off the things") and students (after reading, "say what has happened so far"). In addition to these roles, the interview offered possible content ("questions you could ask").

After listening to Jessica's pass, Elle said that she didn't really want to do a comprehension interview because she didn't want to focus on assessing comprehension. The future offered by the interview was not one that she was oriented to with her goals.

**Re-envision to Invent.** In reply to Elle's reticence about the comprehension interview, Jessica re-framed what she was envisioning. She refined the idea of the interview and positioned Elle's role as having multiple available questions to ask, "I was just trying to think of like, how -- I guess more I was thinking about, if you had some question -- like if we wrote some questions that you could use as prompts." Jessica carried on by clarifying the difference between the comprehension interview and what she envisioned for Elle's situation,

> "They wouldn't necessarily have to be these words, like assessing,
>
> "Did you comprehend?"
>
> But like -- or like that I think I mentioned one time, the Think-Along Passage that has similar questions, words like -- but that one is also more about your strategies. So like,
>
> "What do you think the passage is about? How do you know that?"

Hearing these last two questions, Elle became very excited and exclaimed "Yes!" which prompted Jessica to voice another possible question, "How could you tell?" With Elle's obvious enthusiasm at this re-seeing of the interview, Jessica turned to what they could do with the rest of their meeting: they could format a similar document to the comprehension interview - a 'Think Aloud Passage' which was a document was shared with Jessica when she took a Midwest University class which was, "apparently teacher created by a small group in some district years ago" - to reflect the reflection that Elle was looking for.

> And so it doesn't actually even have a spot on there to assess whether or not it's accurate, that they like, identify the topic. It's just about
>
> "Do you know how you *would* identify the topic?"

Clarifying the difference between student accuracy and student strategy use was a successful re-envisioning of the comprehension interview. Jessica, having re-framed the possibilities the

comprehension interview provided, asked Elle if they should revise the Think Aloud Passage Sheet (TAPS) in light of the interview genre, and co-author a document that Elle could use with her students. This was now aligned with her goals in a scene she could envision, and thus invent for.

**Invent to Orient.** Jessica and Elle both opened the document and started to read through what was there. As they did, they revised it to facilitate conducting reflection interviews with Elle's students. Elle said that she liked the first section of the Think Aloud Passage worksheet and its questions, "'What do you think the passage is about? How do you know that? What do you think will happen next? Why do you think that?" Elle became increasingly excited as Jessica said these questions aloud, agreeing with this line of questioning because, "we do that every day." Situated in her context according to their daily routines, these questions helped the document align with ongoing classroom practice.

During the course of revising the TAPS, Jessica and Elle reworked both the language and the format of the worksheet. Jessica would read aloud a section and ask Elle what she thought she wanted to include. For example, she asked, "So which of these strategies up top, like the questioning, clarifying -- which of those do you think we need to include in that box?" The language and design of the TAPS informed each other, an essential point when integrating multimodal design choices *with* texts in teachers' process of creation for students.

At one point in the creation, Elle got stuck on how to represent "paying attention to my thinking" unless it just came up in conversation. Jessica re-oriented to the typed-up questions because "maybe that will help us tease it out." She read the question that was there but said, "that's not what they're going to ask." Anticipating that students wouldn't take up this language,

Jessica asked Elle, “what would be a general question you could ask them?” Elle responded by immediately voicing a direction that she would give her students, saying,

"Show me a part that was difficult for you,"

Or,

"Point to something that was difficult for you to understand,"

or something like that.

Elle’s response inspired Jessica to re-think the structure of the TAPS for that section. She said,

So, hold on for one second. What if we had that being its own little section? Like,

"Show me a part that was difficult for you,"

and that's where you would assess ‘Paying attention to my thinking.’ And -- because then it would be like -- then we could reword it, but it's like the idea of,

"I am able to show you the part that"

Because if you can't even show me a part that was difficult for you, you're not going to be able to do --

Revising the TAPS sheet involved co-constructing a multimodal document to fulfill multiple goals in a situated context. In order to fulfill the goal of having students articulate their own thinking, Elle envisions language she would use with her students, which is then recruited into the language and structure of the sheet. To evaluate what they have, Jessica voiced a successful student who would use this language (“I am able to show you the part that”). Elle agreed with what Jessica was saying, and then said that she liked the language “just having its own row.” They proceeded to make it its own row, showing again how intertwined language and structure inform each other as making becomes a vehicle for envisioning.

With that, Jessica and Elle wrapped up the session together having completed the TAPS that Elle would use with her students. Jessica pointed out that she could use the sheet with any text in her class, and that it would work as a pre-assessment and her summative assessment for *The Giver* unit. She added that "you can really do this pre-assessment whenever you want, at this point," to which Elle got excited and said, "We could even do it out of the stuff they're reading now!" Her jump to sequencing a possible future, in using it right away, prompted Jessica to say,

> Yes, I would make sure it's fiction, so it's comparable. But you totally could. That's my point, is that -- and then you and I could use that in our planning. Like,
>
> "Okay, these are the ones that they're really struggling with still; what do we need to do next?"

With this move, Jessica is planning for them to plan. If Elle gave herself classroom experiences with the students and using the TAPS, then the two of them could assess what students were struggling with (that situation's given) and orient accordingly to invent appropriate instruction.

## Conclusion

In this chapter, Russell, Jessica, and Elle oriented to goals, created with available mediational means, and envisioned possible futures. Time and again these teachers demonstrated how cognitive work is distributed, situated, and social. They drew on their own past experiences, accrued knowledge of students and contexts, and available materials. They used digital texts and platforms to compose and store their work. They planned in light of their students' learning – seeing texts through their eyes and envisioning scenes of ideal use. Indeed, they consistently evaluated plans from the perspective of students. Doing so provided opportunities for them to evaluate their goals – if students were seeing themselves as readers, or if they were finding authentic opportunities to connect to the curriculum. Evaluating plans from their students'

perspectives also allowed teachers to identify opportunities for ownership or confusion. Jessica and Elle's collaborative and co-constructed planning challenges the notion that planning is accomplished by a sole teacher planning for her students.

Planning cannot happen without a context. Each time these teachers created an artifact or idea, they evaluated it in light of how it might play out in their local activity system. This dynamic, three-part model serves as a way to look at and talk about context and practice. It provides a lens and language to describe teacher activity. In such naming, teachers are better able to describe their practices, their preferences, and their ideals, and those who work with teachers are better able to engage with this core practice.

# CHAPTER 7

# DISCUSSION AND IMPLICATIONS

This study investigated the planning practices of eight experienced teachers in the central Midwest over the course of one semester. Using qualitative methods and a CHAT framework, I worked to illustrate the complex factors teachers navigate when planning. The situated accounts I provided in Chapters 4 and 5 highlight the highly social, multimodal, and multipurposed nature of planning as teachers negotiate, anticipate, and invent possible futures for themselves and their students. The model I developed in Chapter 6 provided one way to foreground the dynamic interplay between the individual teachers and the contexts within which (and for which) they are planning. This study makes visible the importance of using a broader research methodology to attend to teachers' planning activity, as it illuminates more wide-ranging features and factors of teacher planning than previous methodologies in teacher planning research.

In this discussion chapter, I review the major findings of the study and make an argument for recognizing the planning practices of teachers as part of their ongoing work. I discuss two central issues - planning as both a contextual endeavor and a tentative enterprise – that cut across all three findings chapters. Following this, I provide implications for practice, focusing on implications for those working with pre-service teacher candidates and for those with in-service teachers. I then argue for further research that attends closely to teachers' planning practices, informed by traditions in Education and Writing Studies. I conclude with limitations of this study and by reasserting my main arguments.

## Summary of Findings

This study builds on a rich tradition of sociocultural research that investigates human activity in its natural contexts. Specifically, I examined the planning practices of eight

experienced public school teachers. Here, I offer a summary of the major findings using two themes that cut across my findings chapters: planning is a contextual practice and a tentative enterprise.

**Planning is a Contextual Practice**

This seemingly simple assertion underpins the planning practices of the teachers who participated in this study. Evolving knowledge of their students (and themselves) shaped how teachers planned for the co-constructed events of classroom life. Situated knowledge of their context – and the givens they needed to take into account – shaped the events and routines they anticipated. These forms of knowledge were dynamic and intertwined with texts and speech in situations, challenging the notion that planning is a purely mental exercise. The contexts that teachers planned within had long histories that affected what they planned for, challenging the notion that planning starts with a blank slate to create a set of lessons.

Previous research showed many ways in which teachers made decisions while planning (Clark & Peterson, 1984). In the current study, the teachers made decisions, about what they and their students might do, how they and their students might do it, and why it mattered to them (opening up opportunities for their students to care about it too). These decisions were fundamentally shaped by the distributed and situated contexts of which they were a part. They built on knowledge of students, both general (taught this grade or class before) and specific (taught these specific students before). They built on teachers' experiences, personally and professionally. They built on academic calendars and rhythms of a school year and were informed by conversations, events, local places, and available people. Planning is a situated practice, a contention that enables closer attention to specific features that are affecting teachers' ongoing planning.

**Planning is a Tentative Enterprise**

Often, making a plan is conflated with accurately depicting the future. Rather than detail scripts and crystalize schedules, these teachers sketched out features of possible futures. Recruiting multiple means to do so – reported speech, textual artifacts, the contours of a school calendar – the teachers foregrounded (and created) pertinent 'givens' with which they designed instruction. Attending to their context, and being responsive to it, this portrait of planning re-frames narratives of planning. Instead of a mechanistic exercise that equates planning as the cause-effect moves of teachers teaching, it instead recognizes how teachers enable the boundaries and resources that enable students' learning.

As teachers anticipated possible futures with their students, they instantiated their planning in multiple forms. The teachers in this study used verbal and textual means to do so. They voiced themselves and students in scenes that they'd like to happen and they envisioned how students might take up texts and composed them with that ideal activity in mind. They verbalized what they would need to do to enable students to access those learning opportunities. They created texts for themselves (ex. plan books) and for students (ex. websites, Google Slideshows, surveys) that, in the process of creating, served as vehicles for planning. Motivated and mediated by textual forms and anticipated situations with and around those forms, teacher planning was less a matter of accurately predicting the future and more of an ongoing attempt to assemble the means and opportunities for it to play out in anticipated ways.

In addition, each teacher played with time as a variable. Kirra left the STEM inquiry open-ended according to time, saying she would let it play out until students lost interest. Sahra and Elle traced the upcoming events of the school year to decide what the events of their curricular unit might look like. Eliette and Amelia framed their goals for the first couple of

weeks of their Social Justice electives. Cora said that she could only plan out a few days to a week because if she did more than that she couldn't be responsive to their needs.

## Implications

Extending from this study, I see implications for practitioners and researchers both. In considering a continuum of teacher development, I outline considerations for teacher education and K-12 educators, then move to opportunities for researchers in Education and Writing Studies to consider this practice of planning that every teacher engages in.

### Implications for Practice

**Teacher education.** Contemporary pre-service education often conflates lesson planning with the textual form it produces – a written lesson plan (almost always using a lesson plan template). While there have been some moves to draw in the narrative aspect of lesson planning (Doyle & Holm, 1998), they work against the strong tide of current pressures from licensure-related assessments (ex. EdTPA). This research study presents multiple entry points for teacher education programs to reflect on opportunities to apprentice educators into the professional practice of planning.

*Teachers plan for the students they have*. Knowledge of their students shapes what teachers ask of them and of themselves, shaping how they planned for the co-constructed events of classroom life. However, pre-service teachers are often tasked with creating acontextual lesson plans with only stock reference to hypothetical students. One example of this might be a section on a lesson plan template that leaves room for accommodations for students with IEPs, but the lesson plan assignment doesn't equip the student with any more details. Or, pre-service teachers are asked to create stand-alone lesson plans for a classroom context they see only once a

week. The bounds of this assignment do not leverage the core practice of building from knowledge of students and events in order to move along a trajectory of learning.

*Teachers assemble a constellation of texts and situations that enable their planning*. Planning often happens through the vehicle of making texts for classroom use. How are pre-service teachers asked to bring in things they have done, made, taught, or experienced as resources to their planning? Teachers plan by leveraging their past experiences – personally and professionally – so how could teacher preparation programs ask pre-service teachers to draw into relation the resources they already bring to the classroom? To that end, pre-service teachers have ways they organize their lives, a rich context for them to explore as they think about how they're going to organize themselves as teachers.

One possible focus is lesson materials. When preparing to plan, pre-service teachers might be asked to find an existing version of the needed materials and revise them for their current classroom context (be it an observation placement or student teaching). Asking them to design / revise classroom materials could then lead to them explaining how they envision students using them and how the using of them makes visible their learning. This sequence could provide pre-service teachers the opportunity for metacognitive practice around planning and invention that they will encounter in the field. In addition, inviting a varied landscape of representations of planning enables teacher educators to ask such questions as: What underpinnings do we ask for in lesson plans, and how are those critical of the behaviorist / cognitivist orientation we've inherited? What representational texts do we ask them to make and how to think critically about their design choices? How do we ask pre-service teachers to anticipate what themselves and students will do and say?

*Teachers plan on multiple time scales*. The laminated chronotopes of planning, where an activity is meant to serve multiple purposes (ex. building community at the beginning of the year *and* assessing a particular skill *and* preparing for a later activity) is a complex and situated reality of classroom planning. While an argument might be made for reducing the cognitive load for apprenticing teachers, there is opportunity to invite consideration of time scales in teacher education assignments. For example, asking students when this lesson (or unit) will take place in the year and how that shapes the decisions they make (ex. if it is the first unit of the year, or one that takes place right after spring break – how are students asked to anticipate what choices they may make during these different times?). Another activity might be to walk through the local school calendar with students to discuss what rhythms they know fall in the school year, and introduce them to ones they may not be aware of (ex. teachers' deadlines for grades are different from when students receive them).

**Teacher professional development.** In our contemporary political climate, there is a strong rhetoric of teacher-proofing education (Philip & Garcia, 2013). Scripted curricula and highly-orchestrated evaluation criteria work to strip teachers of their agency and autonomy – often through attempting to voice/script both students and teachers. Amplifying voices that speak against this narrative, this study foregrounds the collaborative, agentive, contextual, and intellectual nature of planning. This perspective has much to offer in-service teachers as they grow in their own practice and those who work with in-service teachers as they help them do so.

By inviting attention to teachers' literate lives (Woodard, 2015), administrators and department heads have the opportunities to draw together the rich out-of-school experiences their teachers bring to bear on their planning. In addition, they might take into account the collaborative co-construction of planning, an ethos that seems to have informed schools making

time for professional learning communities (PLC's). As districts think about apprenticing early career teachers into the profession, they might make more time for early career teachers to work with experienced and other early career teachers. As formal evaluations take place, there is an opportunity for evaluators to look at more textual artifacts than the formal lesson plan as they think about the lesson they observed in relationship to others.

As in-service teachers consider and talk about their own planning practices, there is an important opportunity for them to collaborate with local resources they might have access to. In addition, recognizing their own practices – among them the ones identified in this study – gives an alternate perspective to their planning (in opposition to notions of 'I don't plan' or 'my planning is a mess,' both phrases which I have heard repeatedly from experienced teachers).

**Implications for Research: Education and Writing Studies**

With this research, I argue that a more holistic understanding of this complex and fundamental practice can help us better articulate what teachers do and how they do it. The data I have presented here illustrates the value of this frame by foregrounding texts, talk, and activity occluded by other research methods. Looking across the eight teachers, we can take from their narratives and texts an opportunity to highlight the creative and intellectual work that teachers do every day. Specifically, I advocate for close attention to teachers' voices in their practices of enabling student agency, ownership, and inquiry.

Before I move into considering Education and Writing Studies specifically, I want to address the advantages and disadvantages of my participant selection, as they might inform qualitative research in both fields. I reached out to teachers I knew from networks I had built over the course of three years in the community. The personal relationships I had with these teachers enabled me to ask them to participate, and my research questions were sometimes

familiar from our ongoing conversations. Our relationships were also a result of knowing these participants in established contexts; for example, I attended the local Social Justice working group that Amelia facilitated and that took place at Eliette's family restaurant. I knew all of except Elle for at least two years . I was drawn to these educators because of their ongoing interest in learning (having met many at the local chapter of the National Writing Project) and their stances towards social justice issues and equity in the classroom. Knowing my participants so well was a consideration in my data analysis, as I reflected on whether I was making data selections to show these participants favorably or avoiding selections that might come across unfavorably. A disadvantage to having so many teachers was that I was not able to add situated planning opportunities for each participant whom I only interviewed. As researchers who employ qualitative methods consider taking up aspects of this study design, I encourage their attention to the deep relationships that underpin both teaching and research.

**Education.** This study draws together the cognitive-based research on teachers and sociocultural studies of teachers in situated settings. It extends the work of studies that highlighted teachers who planned to be responsive to students (Bomer, 2011; Miller, 1991). It involves focusing on critical intentionality of teacher *making* for their selves and students (Bisplinghoff, Hubbard & Power, 2002). It also extends the field methodologically as well by inviting CHAT and distributed cognition into education where Wertsch has had some uptake, but the bounds of classroom life have held strong. This distributed perspective, which takes planning not as evident or located in one place, asks us to look at formal places, but also beyond them. In addition, this perspective invites us to see when and how teachers are recruiting systems of which they are a part in relation to their individual strategies.

Importantly, this study situates planning outside of teachers' heads and attends to their cognition in natural settings *with* mediational means they have available to them. By considering planning as situated, creative, and purposeful, the study broadens notions of planning to help think about situations that act as catalysts and 'carriers' of planning. While there has been some intensive work on collaborative planning sessions like Lesson Study (Jalongo, Rieg, & Helterran, 2007), that research considers a highly structured collaborative event that seeks to create one lesson, not the ongoing, naturally situated events that teachers engage in everyday practice.

Finally, this study raises important questions about the relationship between good planning and good teaching, one version of general efficacy narratives as applied to teaching. While not addressed here, I would be wary of framing teaching as solely a cause and effect relationship. This position is especially pertinent in light of the complex, multi-faceted, and responsive practices and contexts these study participants engage in as they plan for their students.

**Writing Studies.** The field of Writing Studies experienced the turn away from cognitive-based research on writing in the 1980's – I would like to join that push against normative discourse and simplistic understandings of another complex, distributed, highly creative practice. Planning builds in interesting ways on studies of writing – because it is inherently partial, unfinished, and distributed across texts and talk, there are similarities but also increased complexity to take into account in situated contexts. The recent attention to the affective dimensions of composing (Ehret & Hollett, 2016; Duff, 2010) the roles that environments and space play in composing (Shipka & Prior, 2013), and the long trajectories of time that develop composing practices (Bazerman et al., 2017) have the potential to provide multiple entry points to furthering our understanding of teachers' planning practices.

Scholars in Writing Studies are well-situated to study teacher planning, especially with their evolving understandings of - and lenses for - the emergent composing practices of people and the systems of which they are a part (Alverez et al., 2017; Fraiberg, 2010; Stornaiuolo Smith, & Phillips, 2016). These ways of thinking don't just look to artifacts of composing (i.e. the plan book) but instead at the orchestration of texts in actors' literate lives (Roozen, 2010; Woodard, 2013). When considering multiple types of technologies, Writing Studies scholars have been critical of social media practices (Buck, 2012), race (Banks, 2011), and ideologies (Wysocki, 2005). In addition, there is a deep vein of supporting teacher agency (Leander & Osborne, 2015; Philip & Garcia, 2013) as well as longstanding engagement with the power of communities in developing thriving communities (Bruce, Bishop, & Budhathoki, 2014). These scholars' perspectives enable a better understanding of the purposeful and complex work that teachers do with various tools, how this work happens over time and in situated contexts, and why it matters to engage with.

Methodologically, I join others in considering dialogic relations with texts and conversations, including work on semiotic remediation practices (Prior, Hengst, Roozen, & Shikpa, 2006) and shadow conversations (Irvine, 1996). This study builds on that work by considering a familiar context – that of teachers anticipating classroom instruction – and looks to consider the complex trajectories of language in texts and conversations. Consistently multi-dialogical, planning is a practice that is informed by other sets of conversations that surround it. I see future work connecting this attention to dialogic practices to distributed memory work and technologies (c.f. van Ittersum, 2007) to think about them as dynamic, available, and social.

Moving forward, I direct the attention of scholars from Education, Writing Studies, and a variety of fields to consider teacher planning. A practice so complex as this would benefit from

the perspectives of those in Art and Design, Sociology, Anthropology, and Communication Studies. I encourage scholars to dig deeply into the richness of this practice to support teachers in developing a language around this practice and furthering our understandings of how to best support planning practices within and across a variety of contexts.

**My Future Research**

Speaking to researchers and teachers, I see multiple avenues for my future work. There is theoretical work to be done with this conceptual framework to join others in leveraging CHAT as a tool for designing and undertaking empirical studies of teacher practice. I anticipate multiple opportunities for fine-grained discursive analysis with how often teachers voiced themselves and students. This is especially pertinent considering my Spring 2016 pilot data which includes a student teacher being apprenticed into the discursive moves of her setting. Overall, I intend to frame my future research to explicitly speak against templates and sequence and equating fixed plans with notions of effectiveness. Instead, I seek opportunities and tools for practitioners to think through their planning practices.

In future work, I will continue to ask how teachers plan to teach something new to them (computer science and coding) as their students also learn it (and, at times, how they learn alongside their students). My perspective on the distributed nature of planning will enable me to better consider the configurations, texts, speech, and contextual factors at play. Computer science is a blossoming field in K-12 education, and a field that relatively few educators are steeped in. This makes available a set of questions regarding how they plan to teach a topic they don't know well, and the experiences that equip them to do so. Broadly, we have a limited understanding of the practices of rural teachers, especially those who work in small school settings (i.e. under 100 students in the school district). I look forward to talking with rural and micro-urban teachers

about their practice and considering the impacts of rural settings on their planning, especially as it applies to computer science and coding.

**Limitations**

Before I conclude, I identify some limitations of this study. Looking at what eight teachers have to share enables us to see examples of practice that bound inquiry and consider the dynamic and ever evolving picture of practice. With that said, their practices are not what every teacher does, nor are their givens and contexts what every teacher navigates. Though I have included teachers from across grade levels focusing on different content areas, I'm not able to generalize, even if I wanted to, about differences between grade level teachers or content area teachers. In addition, this study does not speak with the benefit of data provided by early career teachers. This population, consisting of both those newly graduated and those moving from another career, would provide a perspective to the apprenticeship into planning practices as they intertwine with individually-developed practices.

Methodologically, I made trade-offs to be able to consider the practices of this number of teachers. I did not follow teachers closely in and out of class to see how each informed the other, but instead bounded this data collection by what was said in interviews and what was captured in data from situated meetings and screencasts. There is opportunity in further research to trace more closely the movements of planning in and out of the classroom, to see *how* student and teacher activity shape the evolution of planning. By not collecting video data, I was not able to closely trace multimodal communication (ex. gestures, facial expressions, joint attention), and instead relied on my field note jottings. This methodological decision enabled me to move with participants into more public spaces (ex. Jessica and Elle when they met in communal spaces) but made unavailable attention to microgenetic non-verbal ways they co-constructed meaning.

## Conclusion

In sum, this study seeks to extend the field of research in teacher planning by presenting data from eight teachers' described and situated planning practices and developing an initial model of teacher planning. Currently, I define planning as the dynamic interaction between orienting, inventing, and envisioning future scenes with and for students. Across the country, teachers do this complex work every day as they anticipate and prepare for ongoing interactions with their students. This activity, as social, mediated, and cognitive practice, is a core feature of contemporary teaching, despite the pressures of standardized curricula. Concerning those pressures, this study explicitly speaks against those who seek to strip teachers of their decision making and co-construction of students' classroom experiences. Teachers are in the position to best know their students, and to respond to their interests and needs. In conclusion, I reiterate the importance of recognizing this core professional practice and look forward to extending this work into the future.

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# APPENDIX A
# INTERVIEW PROTOCOLS

**Interview #1 Protocol**
**August / September**

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*Standard questions with possible sub-questions available:*

1. What do you teach?
    1. How long have you been teaching?
    2. What grade level(s)?
    3. What is your educational background and what are your certifications?
2. Could you describe 'how you plan'?
    1. How do you keep track of your planning?
    2. Who do you work with in the course of your planning / do you co-plan with anyone?
3. What are you planning for now, as you start the year?
    1. What classes are you planning for?
    2. What routines do you want to establish with your students?
    3. What are you anticipating shaping this upcoming year?

**Interview #2 Protocol**
**October / November**

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*Standard questions with participant-specific sub-questions:*

1. What are you planning for at this point in the year?
2. How are you planning for it?

# APPENDIX B
# IRB DOCUMENTS

**University of Illinois at Urbana–Champaign**

**Institutional Review Board Office**
528 East Green Street, Suite 203, MC-419
Champaign, IL 61820
tel: 217-333-2670 fax: 217-333-0405
E-mail: irb@illinois.eduWeb:
www.irb.illinois.edu

## IRB Application for Exemption

### Application for Review of Research Involving Human Subjects

**All forms must be completed, signed by the RPI, and submitted by FAX, Email, or single-sided hard copy.**
**Please type responses, handwritten forms will not be accepted.**

**Please, no staples!**

☒ Initial Submission
☐ Revised IRB-1, date of revised IRB-1 _____

**1. RESPONSIBLE PROJECT INVESTIGATOR (RPI)** The RPI must be a nonvisiting member of UIUC faculty or staff who will serve as project supervisor at UIUC. **For other research team members [including those from other institutions], please complete the Research Team Attachment and provide with the completed application.** Include all persons who will be 1) directly responsible for the project's design or implementation, 2) recruitment, 3) obtain informed consent, 4) involved in data collection, data analysis, or follow-up.

| | | | |
|---|---|---|---|
| Last Name: McCarthey | First Name: Sarah | | Academic Degree(s): PhD |
| Dept. or Unit: Curriculum & Instruction | Office Address: 311 Education | | Mail Code: MC-708 |
| Street Address: 1310 South Sixth St. | City: Champaign | State: IL | Zip Code: 61820 |
| Phone: 217-244-8286 | Fax: 217-244-4572 | E-mail: mccarthe@illinois.edu | |
| UIUC Status: Nonvisiting member of (Mark One) ☒ Faculty ☐ Academic Professional/Staff | | | |
| Training<br>☐ CITI Training, Date of Completion, 10/12/14<br>☐ Additional training, Date of Completion[1], 01/19/16 | | | |

**2. PROJECT TITLE**

The Practices and Contexts of Teacher Planning for Literacy Instruction

**3. Please review the six [6] categories of exemption listed below and indicate the category or categories that apply to your research. [Note: Exempts do not apply for prisoners, or for research that specifically targets persons who are cognitively impaired or persons who are economically or educationally disadvantaged.]**

☒ 1. Research conducted in established or commonly accepted educational settings, involving normal educational practices, such as (i) research on regular and special education instructional strategies, or (ii) research on the effectiveness of or the comparison among instructional techniques, curricula, or classroom management methods.

☐ 2. Research involving the use of educational tests (cognitive, diagnostic, aptitude, achievement), survey procedures, interview procedures or observation of public behavior[3], unless: (i) information obtained is recorded in such a manner that human subjects can be identified, directly or through identifiers linked to the

[1] [1] Additional CITI modules may be required depending on subject populations or types of research. These include: (i) research enrolling children; (ii) research enrolling prisoners; (iii) FDA regulated research; (iv) data collected via the internet; (v) research conducted in public elementary/secondary schools; and, (vi) researchers conducted in international sites

subjects; and (ii) any disclosure of the human subjects' responses outside the research could reasonably place the subjects at risk of criminal or civil liability or be damaging to the subjects' financial standing, employability, or reputation.

☐ 3. Research involving the use of educational tests (cognitive, diagnostic, aptitude, achievement), survey procedures, interview procedures, or observation of public behavior that is not exempt under paragraph (b)(2) of this section, if: (i) the human subjects are elected or appointed public officials or candidates for public office; or (ii) federal statute(s) require(s) without exception that the confidentiality of the personally identifiable information will be maintained throughout the research and thereafter.

☐ 4.Research involving the collection or study of existing data, documents, records, pathological specimens, or diagnostic specimens, if these sources are publicly available or if the information is recorded by the investigator in such a manner that subjects cannot be identified, directly or through identifiers linked to the subjects. [**Note: to be eligible for this exemption, all data, documents, records or specimens must exist prior to IRB review and must have been collected for purposes other than the proposed research. To qualify for an exemption in this category, the proposed research must be strictly retrospective.]**

☐ 5. Research and demonstration projects which are conducted by or subject to the approval of department or agency heads. The program must deliver a public benefit or service (e.g., Social Security Act or Older American Act). Such research or demonstration projects must be conducted pursuant to specific federal statutory authority; there must be no statutory requirement that the project be reviewed by an Institutional Review Board and the project must not involve significant physical invasions or intrusions upon the privacy of participants.

☐ 6. Taste and food quality evaluation and consumer acceptance studies, (i) if wholesome foods without additives are consumed or (ii) if a food is consumed that contains a food ingredient at or below the level and for a use found to be safe, or agricultural chemical or environmental contaminant at or below the level found to be safe, by the Food and Drug Administration (FDA) or approved by the Environmental Protection Agency (EPA) or the Food Safety and Inspection Service of the U.S. Department of Agriculture (USDA).

If the proposed research does not qualify in any of these categories, please complete the IRB-1 application found at: www.irb.uiuc.edu

**4. Research Summary:** Please summarize, in lay language, the objectives and significance of the research.

Teachers are expected to negotiate and coordinate various factors as they plan for instruction. With school, curricular, and classroom variables, they must make informed decisions about what takes place over a year, during a unit, and within a class period. How do they plan for instruction, and what shapes their decision making? In secondary English classrooms, factors such as materials and technology often affect writing instruction. How do teachers negotiate these factors as they plan for writing instruction, and what shapes this negotiation over time? The objectives of this research study include identifying the practices, texts, and relationships that affect teachers' planning for writing instruction to better understand their decision making processes and how they facilitate or undermine student composing.

**5. Participants:** Describe who will participate in the research and how they will be recruited.

In-service teachers will participate in the research study. We will obtain active written consent from all teachers participating in the study. We will recruit teachers by contacting school administration to identify a team of English Language Arts teachers who are appropriate for the study, and who might be available and interested. We will then contact these teachers, explain the study to them, provide consent forms, and answer any questions they have. The research site is often a site for pre-service teachers, some of whom observe and others who student

teach, so the study will incorporate these participants as applicable. We will not be including data from students while observing classroom interactions.

**6. Research Procedure:** Specifically describe what the participants will do and where the activities will take place. Outline the approximate dates and durations for specific activities, including the total number of treatments, visits, or meetings required and the total time commitment. Please include a copy of each of your measures as attachments.

Participants will engage in their ongoing planning meetings and classroom instruction, which researchers will observe. Planning meetings, where grade-level teachers collaboratively plan together for grade-level instruction, take place daily. The study will start Feb 1 or as soon as IRB approval is granted, and last through June 2017.

Data collected will include notes, documents, and instructional artifacts created by teachers. These documents could include drafts and final assignment sheets, plan books, curricular documents, handouts and other writing created for students' use, and notes that the teachers write for their own use. They will be documented by taking pictures of them. Data will also include recorded interviews of in-service and, if applicable, pre-service teachers

**7. Data Collection** Please explain how confidentiality will be maintained during and after data collection. If applicable, address confidentiality of data collected via e-mail, web interfaces, computer servers and other networked information.

All data will be kept confidential and stored in a locked cabinet. Data will be stored by subject ID number with the ID key stored elsewhere. Names will not be used once the data are collected. All forms of digital data will maintain confidentiality by saving all data on password protected web-based platforms. Teacher data will be recorded, transcribed, and coded on such protected interfaces. For documents that have teacher or student names on them, digital means will be used to permanently occlude the names.

**8. Consent Process:** Describe when and where voluntary consent will be obtained, how often, by whom, and from whom. Attach copies of all consent and assent forms.

Voluntary consent will be obtained from participating teachers at the beginning of the study. The consent form is attached.

**9. Dissemination of Results:** What is (are) the proposed form(s) of dissemination (e.g., journal article, thesis, academic paper, conference presentation, sharing with the industry or profession, etc)?

The proposed forms of dissemination are journal articles, conference presentations, and potentially books. Results will also be part of Ms. Kennett's dissertation.

**10. Individually identifiable information:** Will any individually identifiable information, including images of subjects, be published, shared, or otherwise disseminated?

☒ No
☐ Yes

If yes, subjects must provide explicit consent or assent for such dissemination. Provide appropriate options on the relevant consent/assent documents.

**11. Funding Information:**

Is your research funded or is there a pending funding decision?

☒ No
☐ Yes

If yes, please indicate the funding agency:

Please provide a copy of the funding proposal.

**12. Expected Completion Date:** June 2016

**INVESTIGATOR ASSURANCES:**

I certify that the project described above, to the best of my knowledge, qualifies as an exempt study. I agree that any changes to the project will be submitted to the Institutional Review Board for review prior to implementation. I realize that some changes may alter the exempt stat us of this project. **The original signature of the RPI is required before this application may be processed (scanned or faxed signatures are acceptable).**

_____ _____
Responsible Project Investigator Date

**This section is for IRB Office Use Only**

UIUC IRB Protocol No. _____
Exempt under 45 CFR §46.101(b) ☐ (1) ☐ (2) ☐ (3) ☐ (4) ☐ (5) ☐ (6)

Reviewed by: _____

TEACHER CONSENT LETTER

February 4, 2016

You are invited to participate in a research project on teachers' planning practices. This project will be conducted by Katrina Kennett under the supervision of Professor Sarah McCarthey from the Department of Curriculum and Instruction at the University of Illinois at Urbana-Champaign.

In this project, Katrina Kennett will attend planning meetings, observe during classroom instruction, and conduct interviews with you. For observations of your planning meetings and normal classroom instruction, you will work with her to agree on best times. Data collected might include notes, documents, and instructional artifacts you create for students' use and for your own use (for example, lesson plans, assignments, handouts, etc). During the interviews, which will be video or audiotaped with your permission, you will be asked to discuss your planning practices generally and in regard to writing instruction. Interviews will be scheduled after school, or during free periods within the school day, and will require approximately 30-40 minutes to complete. This study will extend over the course of several curricular units, so you will work with Katrina to determine the best time commitment for your classroom.

All information obtained during this research project will be kept anonymous and secure. The video or audiotapes will be kept in a locked file cabinet and will be accessible only to project personnel. Data will be coded to remove individuals' names and will be erased after the project is completed. All digital data will be kept in secure online platforms.

The results of this study may be used for a dissertation, a scholarly report, a journal article, and conference presentations. In any publication or public presentation, pseudonyms will be substituted for any identifying information.

Your participation in this project is completely voluntary, and you are free to withdraw at any time and for any reason without penalty. Your choice to participate or not will not impact your job or status at school. You are also free to refuse to answer any questions you do not wish to answer. You will receive a copy of the research results after this project is completed.

We will not tell anyone any information about you. When this research is discussed or published, no one will know that you were in the study. However, laws and university rules might require us to disclose information about you. For example, if required by laws or University Policy, study information which identifies you and the consent form signed by you may be seen or copied by the following people or groups: a) The university committee and office that reviews and approves research studies, the Institutional Review Board (IRB) and Office for Protection of Research Subjects; and b) University and state auditors, and Departments of the university responsible for oversight of research.

If you have any questions about this research project, please contact Katrina Kennett by telephone at 603-568-7459 or by email at kennett@illinois.edu or Professor McCarthey by telephone at 217-244-1149 or by email at mccarthe@illinois.edu.

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I have read and understand the above information and voluntarily agree to participate in the research project described above. I have been given a copy of this consent form.

_____ _____

Signature Date

If you have any questions about your rights as a research participant, please contact the Office for the Protection of Research Subjects at **irb@illinois.edu** or 217-333-2670.